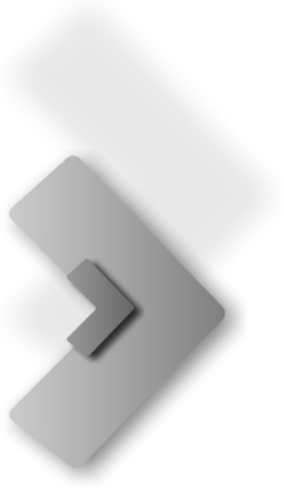

GoldMine Premium Edition Installation Guide

Version 8.0

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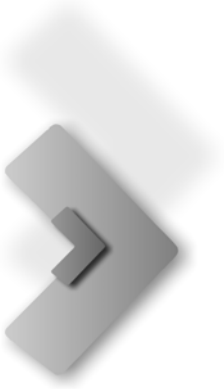

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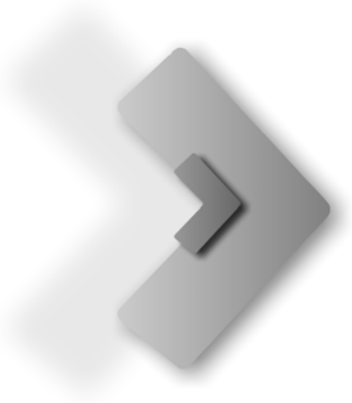


Introduction

Welcome to GoldMine

GoldMine provides your organization with a powerful, comprehensive, integrated, automated solution to managing customer relationships. It offers effective tools to develop contacts, conduct activities, and track progress. With GoldMine's synchronization features, users working remotely can stay current with the main company database.

About this Guide

The *GoldMine Installation Guide* describes the basic components and steps for installing GoldMine on your server, client workstations, and undocked computers.

The appendixes help you integrate GoldMine smoothly with your other technology tools.

📖 Please see the online Help for additional information.

Audience and Expertise

The information in this manual is written for GoldMine users and system administrators performing installations. It describes the system requirements, step-by-step installation instructions, and tips for server setup, workstation setup, and undocked user installations.

This material assumes the user has an understanding of the Microsoft Windows operating system.

Document Conventions

Example	Description
File>>Print	Menu bar commands (in this example, select **File** on the menu bar, then select **Print** in the drop-down menu)
The **Select a Data Source** dialog box appears.	Dialog boxes and menu items in bold
OK	Button names
Note	Additional information
CAUTION/WARNING	Critical information to prevent functionality or data loss
📖	Reference to another topic or resource

Contact Us

Support Site

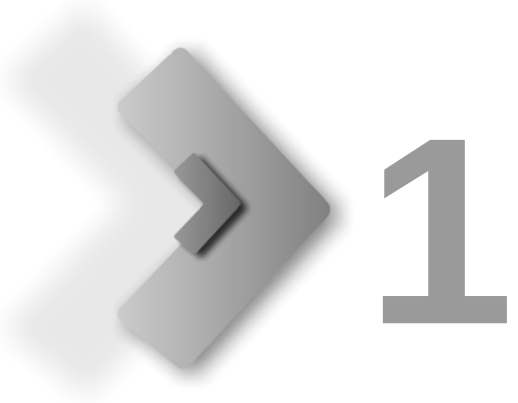
FrontRange Solutions can answer your technical support questions about HEAT, GoldMine, and FrontRange product families. Visit:

support.frontrange.com

Contact Information

FrontRange Solutions Worldwide Headquarters
4120 Dublin Boulevard, Suite #200
Dublin, CA 94568 USA
TEL: 800.776.7889

Offices are also located in Colorado, United Kingdom, Germany, South Africa, Australia, Singapore and China. For international locale information, refer to the Global Sites area of the FrontRange Solutions Web site.



System Requirements

Overview

Before you begin a network server, client workstation, or undocked/single-user GoldMine installation, make sure your system meets the system requirements for the environment.

Level of Windows Security

Members of the Power Users group can create user accounts, but can modify and delete only those accounts they create. They can create local groups and remove users from those local groups and can also remove users from the Power Users, Users, and Guests groups.

Power Users group members cannot modify the Administrators or Backup Operators groups, nor can they take ownership of files, back up or restore directories, load or unload device drivers, or manage the security and auditing logs.

CAUTION: If you are running Windows XP, Windows 2000 Professional, Windows 2000 Server, or Windows 2003 Server, you must be logged on as a Power User or local administrator or be part of a Power User or administrator group.

📖 Consult Microsoft Windows online help for further information.

Environments

Pay particular attention to the system requirements that apply to your environment and license type.

GoldMine can be installed and run in various environments. For example, you can install GoldMine on a Server, or select a regular computer to host a server installation. Environment is influenced by database size and capabilities, performance considerations, number of shared/undocked users, and so on.

GoldMine **Premium Edition** uses either the Microsoft SQL Server or Firebird database.

Host Requirements

Requirements are listed for the following:

- Server
- Shared Workstation
- Undocked/Single-user

Note: If using GoldMine with Microsoft SQL Server, use **Recommended** instead of **Minimum** requirements.

Server Requirements

Network Operating Systems

FrontRange Solutions supports these network operating systems:

- Microsoft Windows 2000 Server/Advanced Server.
- Microsoft Windows 2003 Server.

Notes:

- Microsoft Windows XP is supported but not recommended as a server. See **support.frontrange.com**.
- FrontRange Solutions does not provide assistance for the installation and setup of Microsoft Small Business Server (SBS). If you are using SBS, it must be installed and working prior to installing GoldMine. Ensure that SBS service packs are current and applied.

Network Protocols

- TCP/IP (recommended)

Server System Requirements

- Microsoft Windows 2000 Server/Advanced Server; Windows 2003 Server.
- Microsoft Data Access Components (MDAC) 2.6 or higher. MDAC is installed automatically with SQL Server, but must be manually installed if you are using a Firebird database.
- SCSI or Ultra DMA Enhanced IDE hard drives: RAID Array or mirrored (recommended).
- 1GB/100 MBps network connection (recommended).

Server Memory Requirements

Database Size	Minimum RAM Allocation
50 MB	128 MB
100 MB	256 MB
500 MB < 2 GB	512 MB
2–5 GB	1 GB
5–12 GB	2 GB
12+ GB	3 GB

Performance Considerations

Server RAM and CPU requirements vary depending upon your database and these factors:

- Number of items in the database:
  - Contact Records (1 KB each)
  - Detail Records (2 KB each)
  - History Records (1 KB each)
  - User-defined fields
- Number of simultaneous users on the network.
- Database size.

Operating Systems

FrontRange Solutions supports these operating systems:

- Microsoft Windows Vista.
- Microsoft Windows XP (Home/Professional).
- Microsoft Windows 2003 Server.

Note: FrontRange Solutions neither supports nor recommends using Windows emulators on Macintosh, Linux, or other operating systems.

Workstation System Requirements

Microsoft Data Access Components (MDAC) 2.6 or higher must be installed on the server and any shared or undocked workstation to enable database functionality. MDAC is installed automatically with SQL Server, but must be manually installed if you are using a Firebird database.

Undocked/Single-user Requirements

These recommendations are made for computers working disconnected from a GoldMine server.

CAUTION: If you are running Windows XP, Windows 2000 Professional, or Windows 2000 Server, you must have Admin or Power User rights in order to install GoldMine.

Operating Systems

FrontRange Solutions supports:

- Microsoft Windows Vista.
- Microsoft Windows XP (Home/Professional).
- Microsoft Windows 2003 Server.

Note: FrontRange Solutions Technical Support neither supports nor recommends using Windows emulators on Macintosh, Linux, or other operating systems.

Undocked System Requirements

Microsoft Data Access Components (MDAC) 2.6 or higher must be installed on the server and any shared or undocked workstation to enable database functionary. MDAC is installed automatically with SQL Server, but must be manually installed if you are using a Firebird database.

Performance Considerations

Your RAM and CPU requirements vary depending upon your database and these factors:

- Number of items in the database:
  - Contact Records (1K each)
  - Detail Records (2K each)
  - History Records (1K each)
  - User-defined field
- Number of simultaneous users on the network
- Database size

Software Requirements

Use Microsoft Internet Explorer 7.0 with GoldMine.

Ancillary Requirements

- **Microsoft SQL Server 2000** (SP6) or **Microsoft SQL Server 2005** must be installed and configured if you are using a SQL database.
- **Microsoft SQL Server 2000/2005 Reporting Services** must be installed and configured to use the Scheduled Reports feature.
- **Microsoft SQL Server 2000/2005 Client Tools** must be installed prior to initiating the GoldMine installation process if you intend to perform a Server installation to share your database.
- **Microsoft .NET Framework 1.1** must be installed and configured to use the Scheduled Reports feature.
- **Microsoft Visual Studio 2003 .NET** must be installed and configured to create reports for the Scheduled Reports feature. End users do not require this application.
- When you select a Firebird database during installation of GoldMine Premium Edition, a working copy of **Firebird 1.5** is installed. To change the default password, Firebird comes with an ISQL command line tool. See the ***GoldMine online Help*** for instructions.

  There are also free tools to help you administrate Firebird, such as those available from **FlameRobin**, **FeniSQL**, and **IBExpert**. The **Firebird 1.5 Quick Start Guide** provides essential details and is available online, including from **www.firebird.sourceforge.net**. To take advantage of other Firebird features, see **www.ibphoenix.com** and **www.firebirdsql.org** for additional information.

Note: FrontRange Solutions does not support these third-party tools.

GoldSync Requirements

GoldSync automated the synchronization of data between a host GoldMine system and multiple remote GoldMine systems.

GoldSync supports multi-user/multi-site environments and includes support for many simultaneous connections. As the amount of data and number of users increase, GoldSync scales as needed for the work load demand.

📖 For details on GoldSync implementation and functionality, see the GoldSync section of GoldMine online Help.

GoldSync System Requirements

Item	Recommended
Operating System	Microsoft Windows 2003 Server – Advanced Server.
Disk Subsystem	RAID Array or mirrored (for larger databases or heavy synchronization load)
RAM Allocation	1 GB (for < 2 GB database with 10 concurrent sync sessions)
Network Connection	100 Base-TX TCP/IP

Installing Premium Edition

Overview

GoldMine provides various types of installations, whether from NetUpdate or CD, a new or upgrade, on a server or workstation, in network or remote. Please review the planning items and considerations, determine the type of installation you are running, and use the associated checklist to ensure a successful installation.

Planning for Installation

When planning a GoldMine installation consider:

1. **Who will be the designated GoldMine administrator?** The GoldMine administrator should have access to network and office resources and be able to address the business-related implementation issues regarding configuration and customization.
2. **Do you have the proper license and registration information for the version of GoldMine you are installing?** For detailed information on licensing, see Chapter 3, "Licensing and Registration."

> 🕮 GoldMine Solutions Partners are GoldMine Certified in installation and setup. To locate a partner in your area, go to **www.frontrange.com** and use the Partner Locator.

3. **Are you going to import data?** Verify you can import the source data into GoldMine.
4. **Does the system administrator have full administrative rights?** To install GoldMine on a network, the GoldMine administrator must have full administrative rights on the network.
5. **Are your service packs compatible and current?** Check the version and service pack number for your Microsoft Windows operating system. Verify no issues exist with your current service pack on the Web site at **support.frontrange.com**.
6. **Have you reviewed the network structure?**
   - Are there multiple domains? Do the users have the correct rights on the GoldMine domain to access GoldMine?
   - Is the server outside the regular network? There may be connectivity issues the network administrator needs to address.
7. **What type of database are you using?** Decide whether to use a Microsoft SQL Server database or a Firebird database. Ask your Sales representative for information.

Installing GoldMine on Windows XP

Windows XP is not a recommended platform for a server.

- Some users may encounter issues with the auto-run installation.
- For users of GoldMine 5.0-5.7 who back up GoldMine by copying the GoldMine folder at C:\Program Files, this means they are not copying their data files and must browse to Documents and Settings\All Users\Application Data\GoldMine to find their data folders.
- Customers using a Windows XP system as a server may have problems with the client workstations accessing the data on the network due to the "split." Users may encounter license errors when performing NetUpdates.

Changes to System Files

Located in the GoldMine folder, these store user and licensing information. System files typically take a BIN or XML format, whether you use Firebird or SQL as your database system.

- **DataDict.xml:** Includes database and field definitions and is required for creation of required databases and maintenance operations.
- **Flags.bin:** Controls the number of users logged on to GoldMine.
- **License.bin:** The system's license control table that stores License Manager information and validates incoming sync connections.
- **Users:** Formerly **Users.dbf**, this is now a table. It is rehosted to the SQL Server starting with version 7.0. It collects the user's information such as user login and permission information.
- **User_info.bin:** Stores SQL login information.
- **GM.ini:** Controls how GoldMine launches.
- **DBAlias.ini:** Stores the database username and password.
- **GoldMine.fdb:** Default database name when Firebird is selected during installation.
- **Firebird ODBC driver:** Made up of the **IscDbc.dll**, **OdbcJdbc.dll**, and **OdbcJdbcSetup.dll** files.

Installation Checklists

If you are:	Then run:
Shared Workstation: An individual in an organization with a multi-user environment who must connect to a shared copy of GoldMine. Installs shortcuts to the client workstation so the end user can connect to the server copy of GoldMine from his or her individual computer.	Full Setup, connected to an existing database or Minimal Setup (not recommended)
Undocked: An individual who often works remotely on a computer with an Undocked sublicense, who synchronizes with a GoldMine server to update information. Install a full copy of GoldMine with a Firebird database on a computer working disconnected from a network.	Full Setup (with U-License)
Gold Sync Server	Full Setup
Shared Server: A company that must support multiple GoldMine users using a shared system. Users can then connect to the server copy from their local client workstations using shortcuts installed by running a Workstation installation.	Full Setup

Server Installation Checklist

- ❑ **Back up your database and folders:** *(Upgrading customers only)* If you are upgrading, back up your GoldMine database. We also recommend backing up your GoldMine folder and any other folders containing files linked to GoldMine before beginning any installation. This prevents the loss of valuable contact information.
- ❑ **Confirm all GoldMine users are logged out of the system:** *(Upgrading customers only)*.
- ❑ **Uninstall linked and integrated programs:** (upgrading customers only) Uninstall GoldMine Link for Word, GoldMine Plus Microsoft Office, GISME, GISMO.
- ❑ **Exit all running system programs and stop services:** Includes third-party utilities that integrate with GoldMine, other GoldMine add-on products (such as GoldSync), the Microsoft Office Shortcut bar. Stop all services that integrate with GoldMine.
- ❑ **Install ancillary programs:** Install necessary programs on the computer serving as the GoldMine server or on another computer on your network. See "Ancillary Requirements" on page 1-8.
- ❑ **Install GoldMine:** Install on the computer serving as your GoldMine server. Select the Server Setup installation and follow the directions in this manual.
- ❑ **License the server copy of GoldMine:** Licensing registers the shared server copy of GoldMine with the appropriate license. See Chapter 3, "Licensing and Registration."
- ❑ **Verify you can launch GoldMine:** Ensure the server installation is functioning properly before installing any workstations.
- ❑ **Share the GoldMine folder:** In order for the client workstations to connect to the shared copy of GoldMine, you must first share the folder in which GoldMine is installed.

Shared Workstation Installation Checklist

- ❑ **Uninstall linked and integrated programs:** *(Upgrading customers only)* Uninstall GoldMine Link for Word, GoldMine Plus Microsoft Office, GISME, GISMO.
- ❑ **Exit all running system programs and stop services:** Includes third-party utilities that integrate with GoldMine, other GoldMine add-on products (such as GoldSync), the Microsoft Office Shortcut bar. Stop all services that integrate with GoldMine.
- ❑ **Create a mapped drive to the shared GoldMine folder:** See "Sharing the GoldMine Folder on the Server" on page 2-23.
- ❑ **Install GoldMine on the Client Workstation:** See "Running a Workstation Installation" on page 2-23.
- ❑ **Verify you can launch GoldMine:** Ensure the workstation installation is functioning properly.

Undocked Computer Installation Checklist

- ❑ **Create an Undocked license:** (undocked license users only) See Chapter 3, "Licensing and Registration."
- ❑ **Uninstall linked and integrated programs:** *(Upgrading customers only)* Uninstall GoldMine Link for Word, GoldMine Plus Microsoft Office, GISME, GISMO.
- ❑ **Exit all running system programs and stop services:** Includes third-party utilities that integrate with GoldMine, other GoldMine add-on products (such as GoldSync), the Microsoft Office Shortcut bar. Stop all services that integrate with GoldMine.
- ❑ **Disconnect the laptop from the network:** Disconnect to ensure GoldMine configures the laptop to connect only with the database on the local computer and not with the network.
- ❑ **Install GoldMine to the undocked computer:** See "Running an Undocked Computer Installation" on page 2-28.
- ❑ **License GoldMine:** Use the appropriate U-license information. See Chapter 3, "Licensing and Registration."
- ❑ **Verify you can launch GoldMine:** Ensure the undocked installation is functioning properly.

Installing on a Server (SQL Database)

A Full Setup installs GoldMine to a common location—usually a shared network drive. Workstation-based users can connect to the server copy from their local computers (after running a Shared Workstation installation).

IMPORTANT: The following steps are for a **New Install**. If you have had a previous version installed, remove the existing version, folders, and databases before proceeding. If upgrading, use the steps in "Upgrading a Server (SQL Database)" on page 2-36.

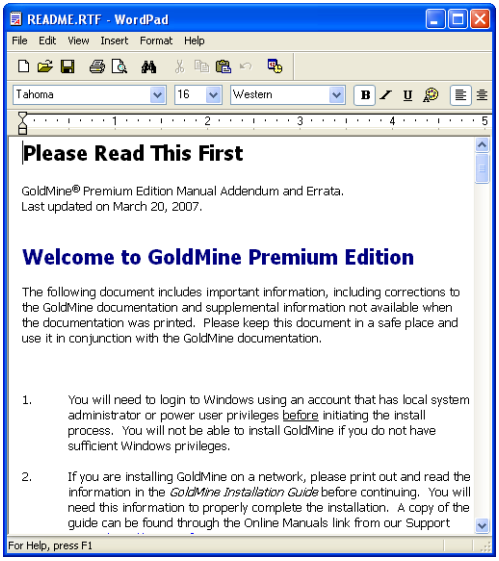
1. Log directly into the server as a local administrator.
2. The installation CD is set up to autorun when inserted into your CD-ROM drive or run the **gmsetup.exe** downloaded to your server installation of GoldMine during the Net-Update process.

   The **Welcome to the GoldMine Installation Wizard** dialog box appears.

GoldMine Installation
Welcome to the GoldMine® Installation Wizard.
The GoldMine® Installation Wizard will install GoldMine® on your computer. To continue, click Next.
Version 8.00.70324
Copyright© 2007 FrontRange Solutions USA
This software includes software developed by the Apache Software Foundation (http://www.apache.org/).
All rights reserved. Warning: This software is protected by copyright law and may not be copied, reproduced, distributed, translated or reduced to any electronic medium or machine-readable form without the prior written consent of FrontRange Solutions USA.
Next >
Cancel

3. Click **Next**.

The **Readme** dialog box appears. Close this dialog box to proceed with the installation.


README.RTF - WordPad
File Edit View Insert Format Help
Tahoma
16
Western
Please Read This First
GoldMine® Premium Edition Manual Addendum and Errata.
Last updated on March 20, 2007.
Welcome to GoldMine Premium Edition
The following document includes important information, including corrections to the GoldMine documentation and supplemental information not available when the documentation was printed. Please keep this document in a safe place and use it in conjunction with the GoldMine documentation.
1. You will need to login to Windows using an account that has local system administrator or power user privileges before initiating the install process. You will not be able to install GoldMine if you do not have sufficient Windows privileges.
2. If you are installing GoldMine on a network, please print out and read the information in the GoldMine Installation Guide before continuing. You will need this information to properly complete the installation. A copy of the guide can be found through the Online Manuals link from our Support
For Help, press F1

4. The **License Agreement** dialog box appears.

GoldMine - InstallShield Wizard
License Agreement
Please read the following license agreement carefully.
(Rev. Oct. 2005v2)
FRONTRANGE SOLUTIONS END-USER LICENSE AGREEMENT
("EULA")
IMPORTANT - READ CAREFULLY
I do not accept the terms in the license agreement
I accept the terms in the license agreement
I am an authorized agent and/or representative of the customer/end-user.
I have read the terms and conditions stated above.
InstallShield
< Back
Next >
Cancel

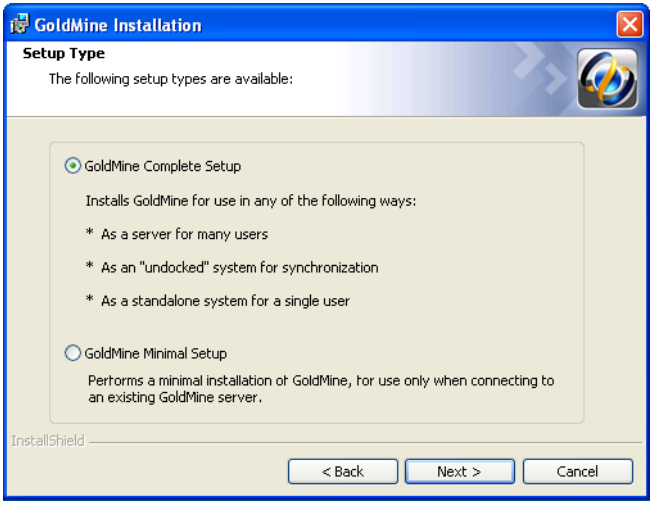
5. Review the licensing information carefully; if you agree to the terms, select **I accept the terms In the license agreement**.

Note: If you do not agree to the terms of the license agreement, select **I do not accept the terms in the license agreement**. Click **Cancel** to terminate the installation.

6. Accepting the terms of the agreement activates the subsequent check boxes. You must select both check boxes to continue with the installation.

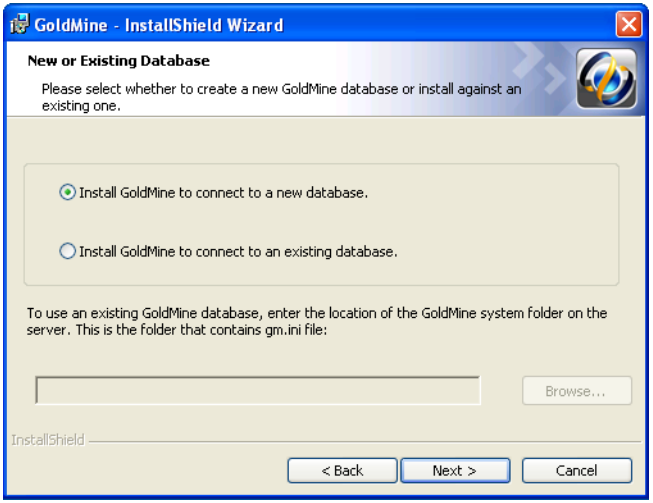
IMPORTANT: Select **I am an authorized agent and/or representative of the customer/end-user** and **I have read the terms and conditions stated above** to continue.

7. Click **Next**. The **Setup Type** dialog box appears.

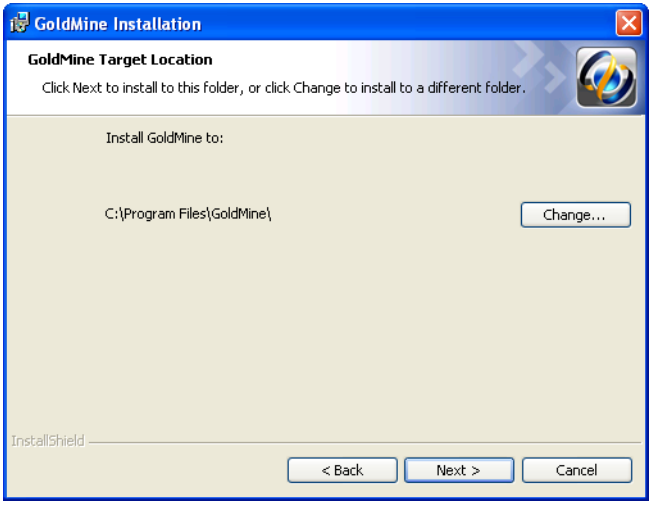

GoldMine Installation
Setup Type
The following setup types are available:
GoldMine Complete Setup
Installs GoldMine for use in any of the following ways:
* As a server for many users
* As an "undocked" system for synchronization
* As a standalone system for a single user
GoldMine Minimal Setup
Performs a minimal installation of GoldMine, for use only when connecting to an existing GoldMine server.
InstallShield
< Back
Next >
Cancel

8. Choose **Complete Setup** or **Minimal Setup**.

9. Click **Next**. The **New or Existing Database** dialog box appears. Choose the desired option to connect to a new or existing database.


GoldMine - InstallShield Wizard
New or Existing Database
Please select whether to create a new GoldMine database or install against an existing one.
Install GoldMine to connect to a new database.
Install GoldMine to connect to an existing database.
To use an existing GoldMine database, enter the location of the GoldMine system folder on the server. This is the folder that contains gm.ini file:
Browse...
InstallShield
< Back
Next >
Cancel

10. Click **Next**. The **GoldMine Target Location** dialog box appears.



11. Click **Next** to install GoldMine in the default location. To install GoldMine to a different location, click **Change**. The **Change Current**

Destination Folder dialog box appears. Type a path or browse to the folder where you want GoldMine installed. To return to the **GoldMine Target Location** window, click **OK**.

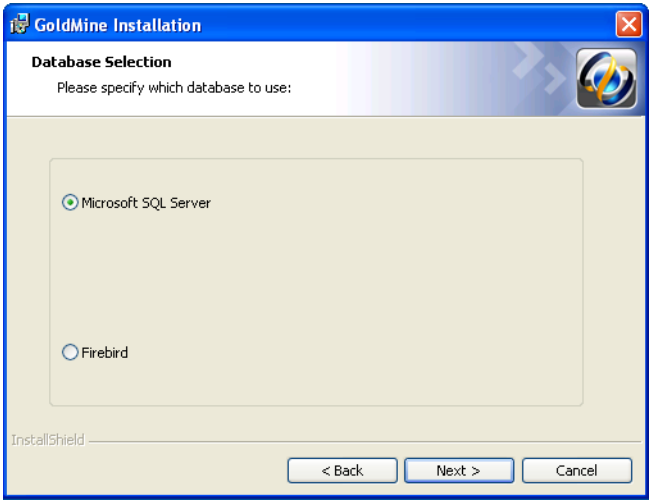
IMPORTANT: Sharing may expose other applications, so do **not** install GoldMine as a root folder of the drive (for example, C:\GoldMine). Install to c:\apps\GoldMine\GoldMine (on Windows 2003 and Windows XP Professional) or C:\Program Files\GoldMine\GoldMine (Windows 2000) This directory should be used only for a GoldMine Server installation (not Undocked, Minimal, or Local installation)

12. Click **Next**. The **Language Type** dialog box appears.

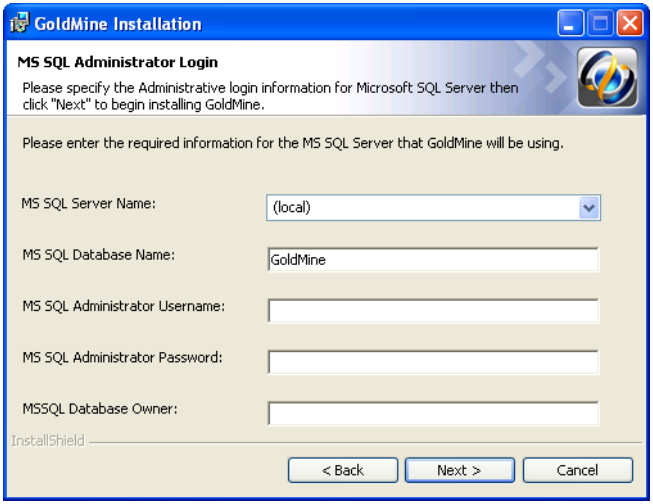
13. Select the local version of English for your installation.
14. To add the demonstration data to the database, check the **Install Demo Data with GoldMine** box.

Note: When upgrading, this dialog box does not appear.

15. Click **Next**. The **Database Selection** dialog box appears.



16. Select **Microsoft SQL Server**.
17. Click **Next**. The **MS SQL Administrator Login** dialog box appears.

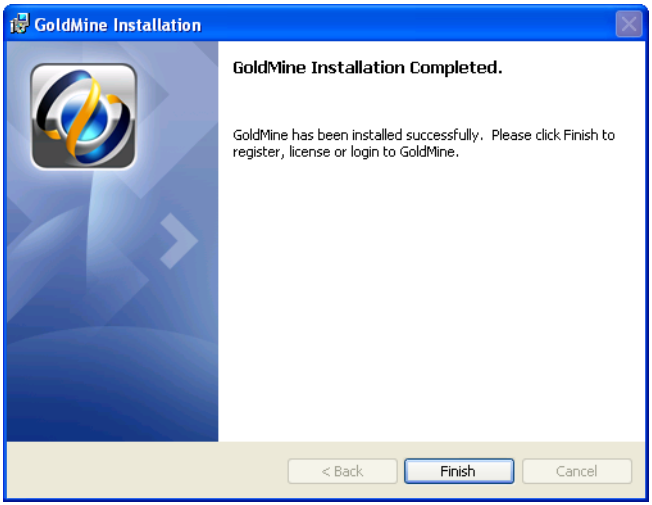

GoldMine Installation
MS SQL Administrator Login
Please specify the Administrative login information for Microsoft SQL Server then click "Next" to begin installing GoldMine.
Please enter the required information for the MS SQL Server that GoldMine will be using.
MS SQL Server Name:
(local)
MS SQL Database Name:
GoldMine
MS SQL Administrator Username:
MS SQL Administrator Password:
MSSQL Database Owner:
InstallShield
< Back
Next >
Cancel

- **MS SQL Server Name:** Type or select the name of the computer on your network where SQL Server is installed.
- **MS SQL Database Name:** GoldMine creates and installs the demo data in a SQL database called GoldMine. If you want your database to have a different name, type it in the text box.
- **MS SQL Administrative Username:** The default login is **sa**. If your SQL Server user name is different, your SQL administrator must provide the information.
- **MS SQL Administrative Password:** Enter the SQL Server administrator password.
- **MS SQL Database Owner:** Enter the name of the SQL Server database owner.

Note: If you click **Next** without typing a user name and password, the **Insufficient Input** dialog box appears. Click **Back**. If you type incorrect information and click **Next**, the **MS SQL Login Failed** dialog box appears. Review the troubleshooting tips, then click **Back**.

18. Click **Next**. The **Ready to Install the Program** dialog box appears.
19. Click **Install** to begin installing GoldMine.
20. The **Installing GoldMine** dialog box appears.

When finished, the **Installation Completed** dialog box appears.


GoldMine Installation
GoldMine Installation Completed.
GoldMine has been installed successfully. Please click Finish to register, license or login to GoldMine.
< Back
Finish
Cancel

21. Click **Finish**.

IMPORTANT: The Welcome to GoldMine dialog box appears to begin the licensing process. See "Licensing Following Installation" on page 3-7.

Installing on a Server (Firebird Database)

IMPORTANT: Using the Firebird database on a server installation is not recommended.

When you select a Firebird database during installation, a working copy of the Firebird database is installed.

This shared Server setup installs a full copy of GoldMine to a common location—usually a shared network drive. Workstation-based users can connect to the server copy from their local computers (after running a Shared Workstation installation).

IMPORTANT: The following steps are for a **New Install**. If you have had a previous version installed, remove the existing version, folders, and databases before proceeding. If upgrading, use the steps in "Upgrading a Server (SQL Database)" on page 2-36.

1. Log directly into the server as a local administrator.

2. The installation CD is set up to autorun when inserted into your CD-ROM drive or run the **gmsetup.exe** downloaded to your server installation of GoldMine during the Net-Update process. The **Welcome to the GoldMine Installation Wizard** dialog box appears.
3. Click **Next**. The **Readme** dialog box appears.
4. Click **Next**. The **License Agreement** dialog box appears.
5. Review the licensing information carefully; if you agree to the terms, select **I accept the terms In the license agreement**.

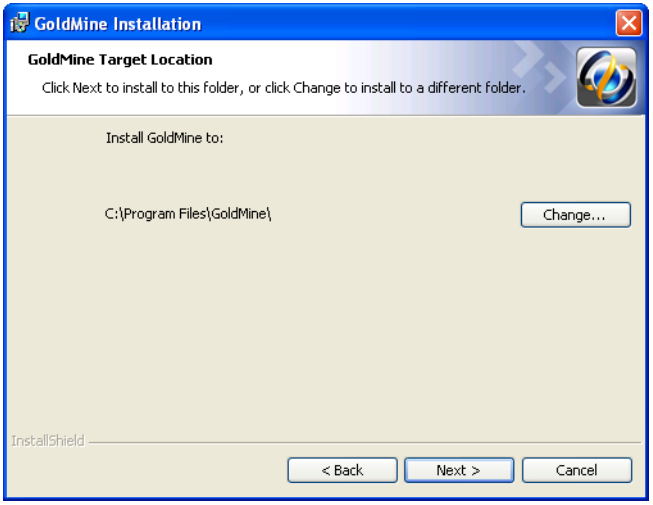
   Note: If you do not agree to the terms of the license agreement, select **I do not accept the terms in the license agreement**. Click **Cancel** to terminate the installation.

6. Accepting the terms of the agreement activates the subsequent check boxes. You must select both check boxes to continue with the installation.

   IMPORTANT: Select **I am an authorized agent and/or representative of the customer/end-user** and **I have read the terms and conditions stated above** to continue.

7. Click **Next**. The **Setup Type** dialog box appears.
8. Choose **Complete Setup** or **Minimal Setup**.

9. Click **Next**. The **New or Existing Database** dialog box appears. Choose the desired option to connect to a new or existing database.
10. Click **Next**. The **GoldMine Target Location** dialog box appears.

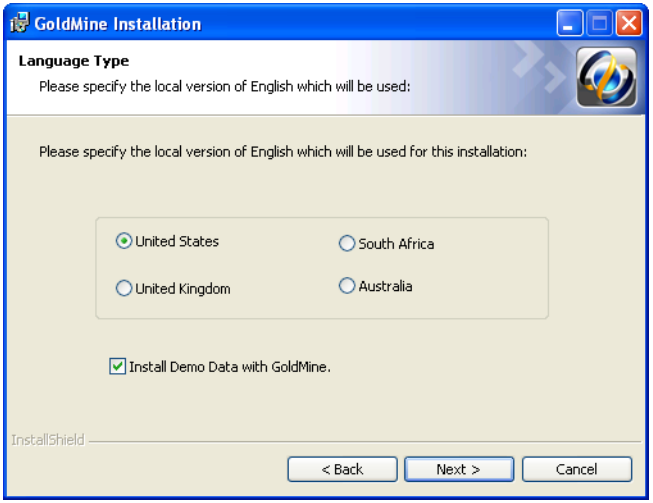


11. Click **Next** to install GoldMine in the default location. To install GoldMine to a different location, click **Change**. The **Change Current Destination Folder** dialog box appears. Type a path or browse to the folder where you want GoldMine installed. To return to the **GoldMine Target Location** window, click **OK**.

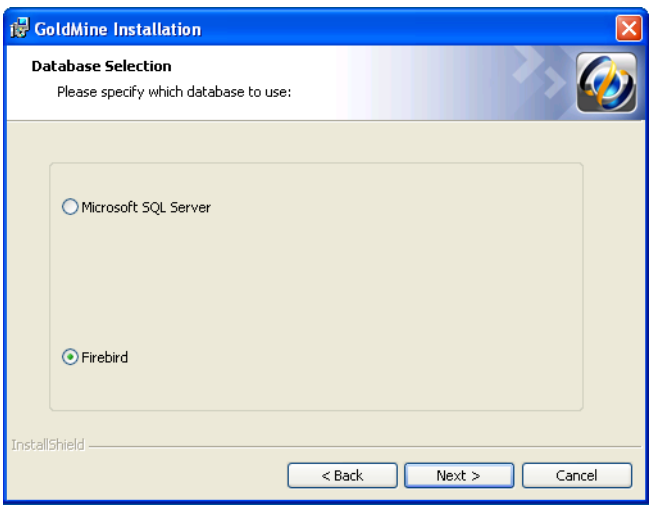
IMPORTANT: Sharing may expose other applications, so do **not** install GoldMine as a root folder of the drive (for example, C:\GoldMine). Install to c:\apps\GoldMine\GoldMine (on Windows 2003 and Windows XP Professional) or C:\Program Files\GoldMine\GoldMine (Windows 2000) This directory should be used only for a GoldMine Server installation (not Undocked, Minimal, or Local installation)

---

12. Click **Next**. The **Language Type** dialog box appears.

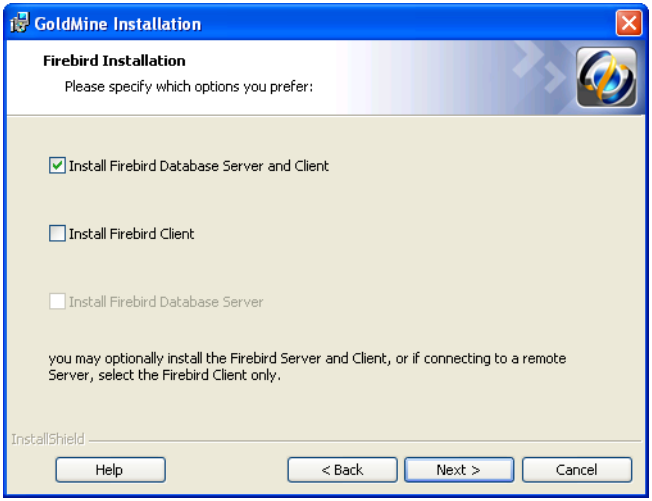


13. Select the local version of English for your installation.
14. Click **Next**. The **Database Selection** dialog box appears.



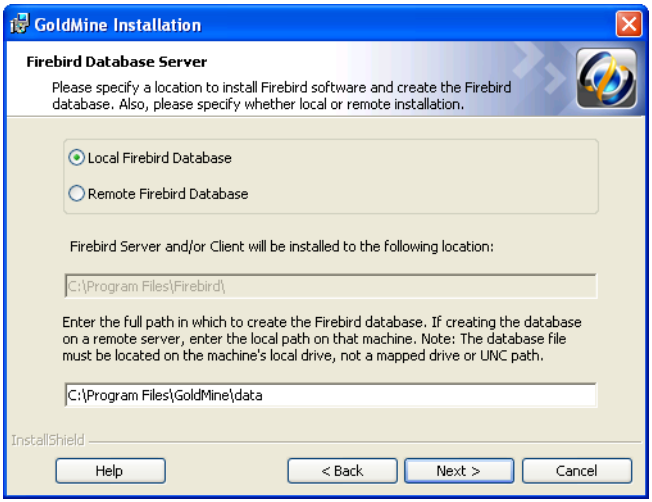
15. Select **Firebird**.

16. Click **Next**. The **Firebird Installation** dialog box appears.

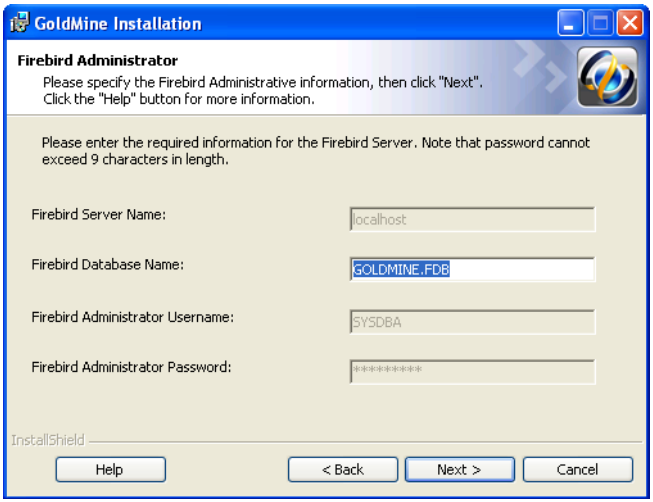

GoldMine Installation
Firebird Installation
Please specify which options you prefer:
Install Firebird Database Server and Client
Install Firebird Client
Install Firebird Database Server
you may optionally install the Firebird Server and Client, or if connecting to a remote Server, select the Firebird Client only.
InstallShield
Help
< Back
Next >
Cancel

Note: This dialog will not appear if either the Firebird Server or Client have already been installed.

17. Select **Install Firebird Database Server and Client**.
18. Click **Next**. The **Firebird Database Server** dialog box appears.


GoldMine Installation
Firebird Database Server
Please specify a location to install Firebird software and create the Firebird database. Also, please specify whether local or remote installation.
Local Firebird Database
Remote Firebird Database
Firebird Server and/or Client will be installed to the following location:
C:\Program Files\Firebird\
Enter the full path in which to create the Firebird database. If creating the database on a remote server, enter the local path on that machine. Note: The database file must be located on the machine's local drive, not a mapped drive or UNC path.
C:\Program Files\GoldMine\data
InstallShield
Help
< Back
Next >
Cancel

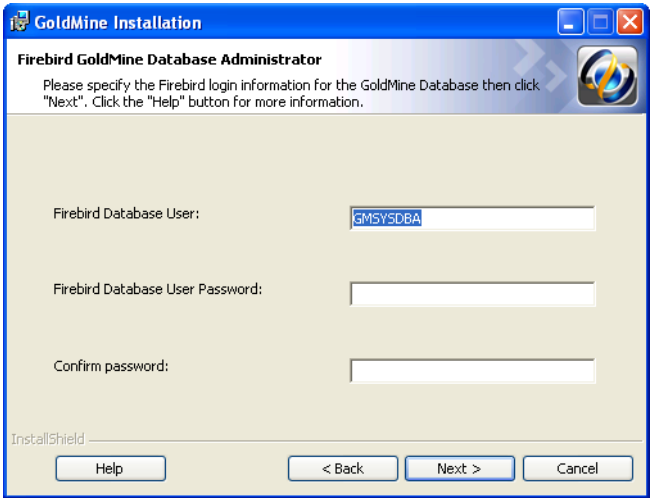
19. Select **Local Firebird Database**.
20. The **Firebird Server/Client** are installed to the drive where the OS is installed (in Program Files\Firebird\firebird_1_5 folder).
21. The **Firebird database** is installed locally on the Firebird server to **Program Files\ GoldMine\GoldMine\Data**. Accept the default or type an valid alternative path (such as <Firebird server> C:\Apps\GoldMine).
22. Click **Next**. The **Firebird Administrator** dialog box appears.



23. Accept the default or specify the appropriate information:
    - **Firebird Server Name:** Name of remote server.
    - **Firebird Database Name:** Name of new Firebird database (with FDB extension).
    - **Firebird Administrator Username:** username.
    - **Firebird Administrator Password:** password.

Note: For a local database these are pre-set initial values. For a remote database, enter the username and password to that database. To maintain security, you must change the user name and password after the installation is complete. See online Help for instructions.

24. Click **Next**. The **Firebird GoldMine Database Administrator** dialog box appears.



25. Accept the default or specify new database login for owner:
    - **Firebird Database User:** The default user **GMSYSDBA** is created.
    - **Firebird Database User Password:** Options are a) accept the default user and type a new password (write it down during setup), or b) type an existing user name. If you specify an existing user as owner, you must type that user's corresponding password before the installation proceeds (if authentication fails, the message "Unable to connect...." appears). Field has 8-character recognition limit.
    - **Confirm Password:** Retype password to confirm.
26. Click **Next**. The **Ready to Install the Program** dialog box appears.
27. Click **Install**. The **Installing GoldMine** dialog box appears. When finished, the **Installation Completed** dialog box appears.
28. Click **Finish**.

Note: The Welcome to GoldMine dialog box appears to begin the licensing process. See "Licensing Following Installation" on page 3-7.

Running a Workstation Installation

A shared workstation setup installs shortcuts on the workstation enabling workstation users to connect to the shared server copy of GoldMine from their individual computers. Choose one of the following configurations:

- Run the minimal installation. This option makes more GoldMine capabilities available to the workstation and is **required** when using Firebird.
- Share the GoldMine folder on the server, then map the same drive on each workstation to the shared GoldMine folder on the server (not recommended if using SoftPhone, Management Intelligence, or a Firebird database).

IMPORTANT: Running GoldMine using a shortcut to a networked drive without a minimal install is not recommended.

Sharing the GoldMine Folder on the Server

To run the shared folder installation, after installing the GoldMine Server setup, share the GoldMine root directory so the workstations function properly. All GoldMine users must have rights to read, write, modify, and delete files for GoldMine to function on the workstations.

IMPORTANT: Sharing may expose other applications. Do **not** install GoldMine as a root folder of the drive, rather, install to c:\apps\GoldMine (on Windows 2003 and Windows XP Professional) or C:\Program Files\GoldMine\ (Windows 2000) and install the server copy of GoldMine to this folder.

1. Navigate to and select the GoldMine folder on the server (for example, **C:\Program Files\GoldMine\GoldMine)**.
2. Right-click for a menu and select **Sharing and Security**. The **GoldMine Properties** dialog box appears.
3. Click the **Sharing** tab.
4. Select the **Share this folder** option.
5. Name the shared folder **GoldMine**.
6. Set the **User Limit** to **Maximum Allowed**.

7. Click **Permissions**. The **Permissions for GoldMine** dialog box appears.
8. From the **Group or User Names** list, select the workstation's user.
9. In the **Permissions for** area, select the **Full Control** check box.
10. Click **OK**. The **GoldMine Properties** dialog box reappears.
11. Click **OK.**

Note: If you are using a different Windows operating system, your steps may vary.

Mapping a Drive on the Workstations

To enable sharing the GoldMine folder on the server, we recommend all workstations accessing the shared GoldMine folder be mapped to the same network drive letter (for example, **G:**) to facilitate GoldMine administration and operations related to linked documents and synchronization.

1. On the workstation computer, start **Windows Explorer** and select **Tools>>Map Network Drive**.
2. From the **Drive** list box, select the designated drive letter for mapping to the GoldMine folder on the server.
3. From the **Folder** list box, Browse to the shared GoldMine folder, for example, **\\GoldMine Server\ GoldMine**.
4. Select the **Reconnect at Logon** check box.
5. Click **OK**.
6. Click **Finish**.
7. Repeat this procedure on each client workstation computer.

Installing on a Workstation

The Minimal setup installs as a process that creates a shortcut to the server copy of GoldMine. The administrator must copy the setup executable to a location available to workstations.

1. From the workstation computer, locate the **gmsetup.exe** file. Double-click to run the executable. The **Welcome to the GoldMine Installation Wizard** dialog box appears.
2. Click **Next**. The **Readme** dialog box appears. Close this dialog box to proceed with the installation.
3. Click **Next**. The **License Agreement** dialog box appears.
4. Review the licensing information carefully; if you agree to the terms, select **I accept the terms In the license agreement**.

Note: If you do not agree to the terms of the license agreement, select **I do not accept the terms in the license agreement**. Click **Cancel** to terminate the installation.

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5. Accepting the terms of the agreement activates the subsequent check boxes. You must select both check boxes to continue with the installation.

IMPORTANT: Select **I am an authorized agent and/or representative of the customer/end-user** and **I have read the terms and conditions stated above** to continue.

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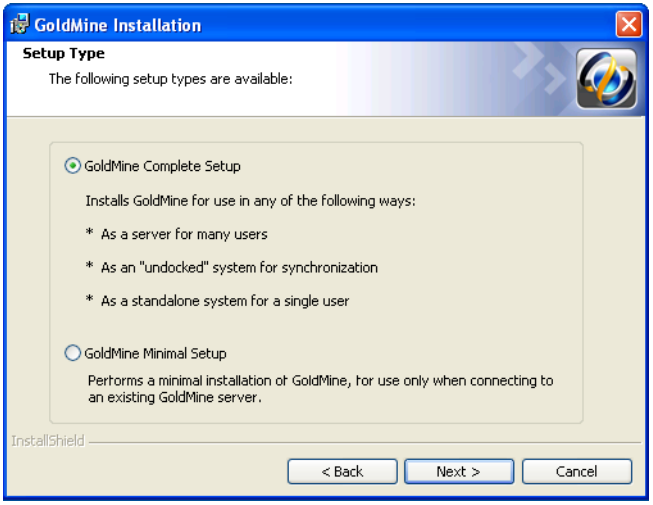
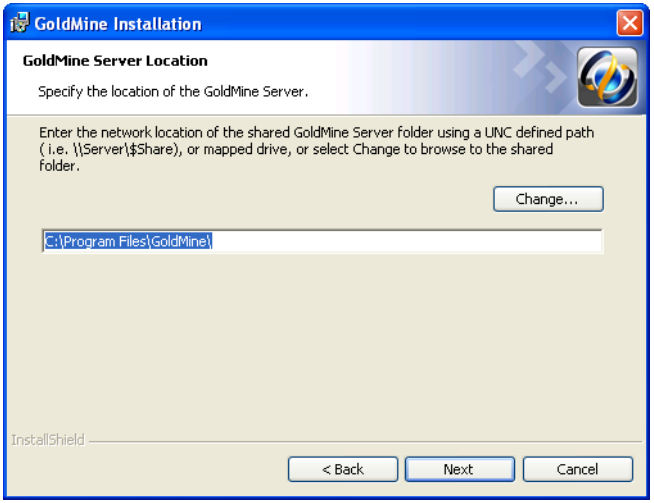
6. Click **Next**. The **Setup Type** dialog box appears.


GoldMine Installation
Setup Type
The following setup types are available:
GoldMine Complete Setup
Installs GoldMine for use in any of the following ways:
* As a server for many users
* As an "undocked" system for synchronization
* As a standalone system for a single user
GoldMine Minimal Setup
Performs a minimal installation of GoldMine, for use only when connecting to an existing GoldMine server.
InstallShield
< Back
Next >
Cancel

7. If you have installed a GoldMine Server Setup on a host computer, select **GoldMine Minimal Setup**.

8. Click **Next**. The **GoldMine Server Location** dialog box appears.


GoldMine Installation
GoldMine Server Location
Specify the location of the GoldMine Server.
Enter the network location of the shared GoldMine Server folder using a UNC defined path (i.e. \\Server\$Share), or mapped drive, or select Change to browse to the shared folder.
Change...
C:\Program Files\GoldMine\
InstallShield
< Back
Next
Cancel

9. In the **Server Location** text box, click **Change** and browse the network for your shared GoldMine server.
10. The **Change Current Destination Folder** dialog box appears. Type the UNC or network path for the shared GoldMine server installation on your network. To return to the **GoldMine Server Location** dialog box, click **OK**.
11. Click **Next**. The **GoldMine Local Files** dialog box appears.

    In the **Local Files Location** text box, click **Change** and browse your hard drive for your preferred folder. To return to the **Workstation Local Files** dialog box, click **OK**.
12. Click **Next**. The **Local Install Option** dialog box appears.

    A normal workstation installation does not install the GoldMine executable file on your local computer. Any network failure will terminate the connection of your local computer to the executable file on the server, and GoldMine will be silently terminated. This may result in system unreliability and the loss of data.

    The Local Install option greatly improves system performance for workstation installations by adding more executable and .dll and files to your local computer. We highly recommend that you select the Local Install option for workstation installations.

    To complete your local installation, select **File>>Configure>>License Manager** and click the **Install Locally** tab after you have completed the installation wizard.
13. Click **Next**. The **Ready to Install** dialog box appears.
14. Click **Install**. The network shortcuts are installed on your workstation computer.
15. When finished, the **Installation Completed** dialog box appears.

Repeat steps 1-16 for each workstation accessing GoldMine.

Running an Undocked Computer Installation

An Undocked setup is the same as a full setup, with the only difference being the license number.

📖 If the undocked computer you are upgrading or installing works remotely, see "Upgrade Considerations" on page 2-35.

Notes:

- If installing an Undocked version of GoldMine while it is in your office, disconnect the laptop from the network so you install a completely independent copy on the computer.
- An Undocked user install is intended for purpose of synchronization. While the following instructions creates the installation, these instructions do not address GoldSync setup. Refer to online Help for instructions on setting up GoldSync.

1. On the undocked computer, navigate to the **gmsetup.exe** file. Double-click to run the executable. The **Welcome to the GoldMine Installation Wizard** dialog box appears.
2. Click **Next**. The **Readme** dialog box appears.
3. Click **Next**. The **License Agreement** dialog box appears.
4. Review the licensing information carefully; if you agree to the terms, select **I accept the terms In the license agreement**.

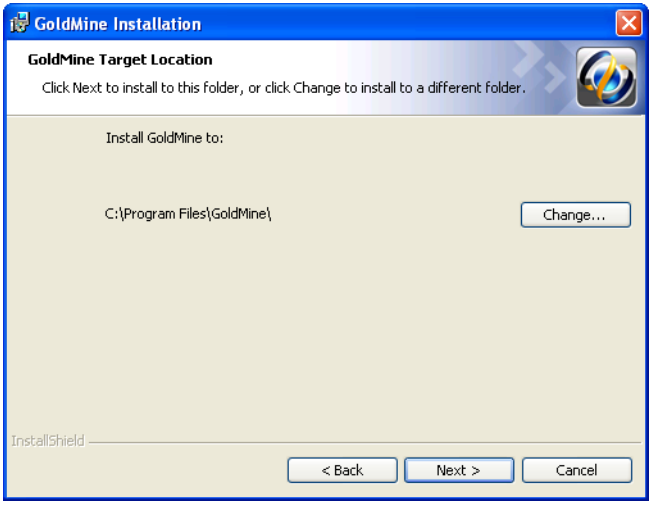
   Note: If you do not agree to the terms of the license agreement, select **I do not accept the terms in the license agreement**. Click **Cancel** to terminate the installation.

5. Accepting the terms of the agreement activates the subsequent check boxes. You must select both check boxes to continue with the installation.

   IMPORTANT: Select **I am an authorized agent and/or representative of the customer/end-user** and **I have read the terms and conditions stated above** to continue.

6. Click **Next**. The **Setup Type** dialog box appears.

7. Select the **Complete** setup type:
8. Click **Next**. The **New or Existing Database** dialog box appears. Choose the desired option to connect to a new or existing database.
9. Click **Next**. The **GoldMine Target Location** dialog box appears.



10. Click **Next** to install GoldMine in the default location. To install GoldMine to a different location, click **Change**. The **Change Current Destination Folder** dialog box appears. Type a path or browse to the folder where you want GoldMine installed. To return to the **GoldMine Target Location** window, click **OK**.

IMPORTANT: Sharing may expose other applications, so do **not** install GoldMine as a root folder of the drive (for example, C:\GoldMine). Install to c:\apps\GoldMine (on Windows 2003 and Windows XP Professional) or C:\Program Files\GoldMine\ (Windows 2000).

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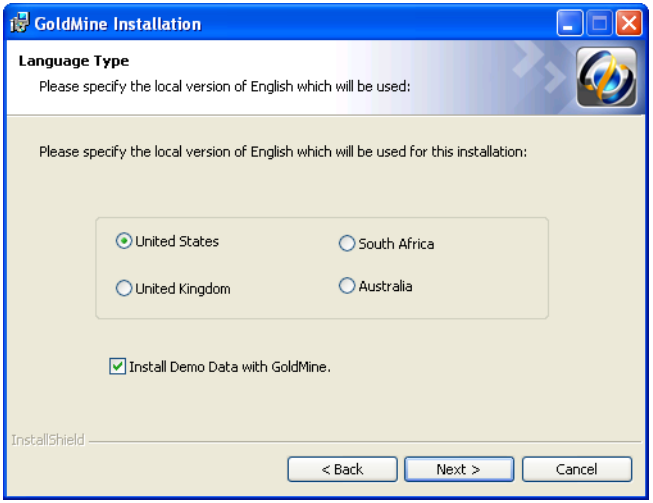
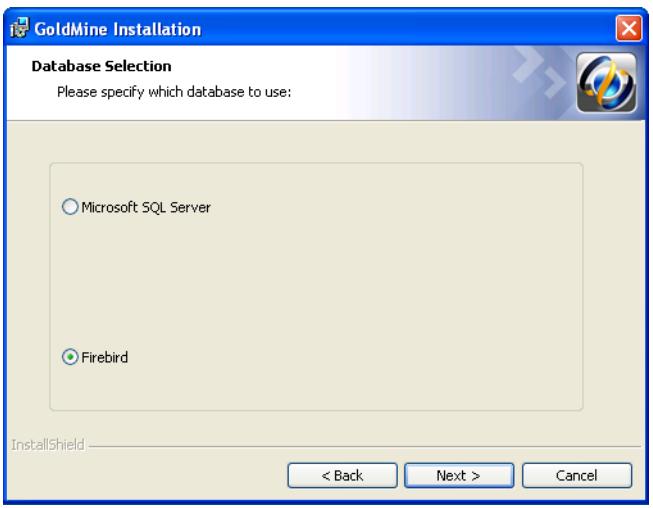
11. Click **Next**. The **Language Type** dialog box appears.

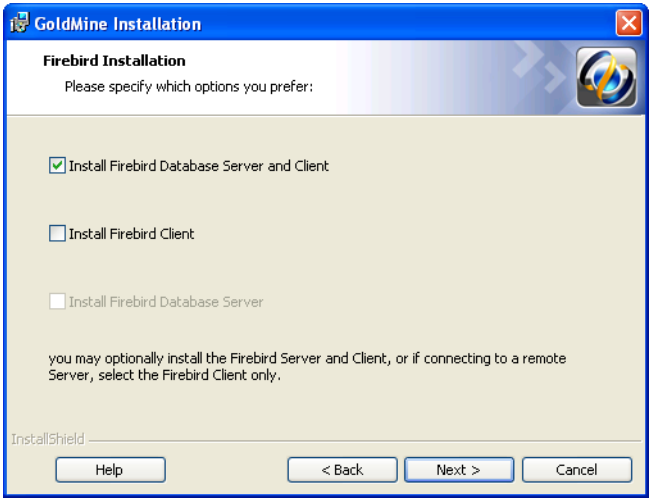


12. Select the local version of English for your installation.
13. Click **Next**. The **Database Selection** dialog box appears.



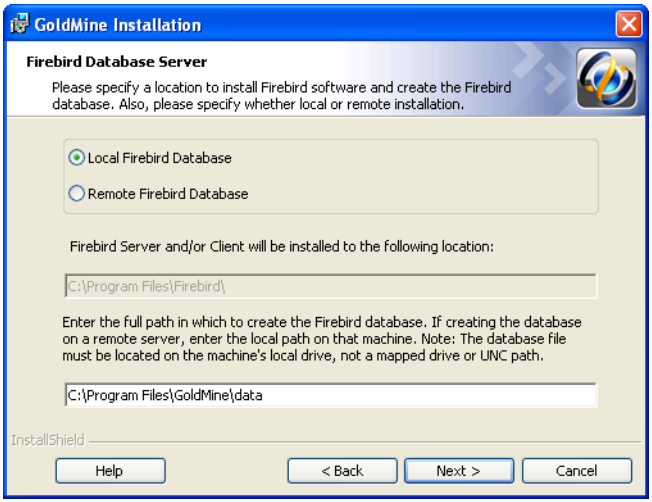
14. Select **Firebird**.

15. Click **Next**. The **Firebird Installation** dialog box appears.

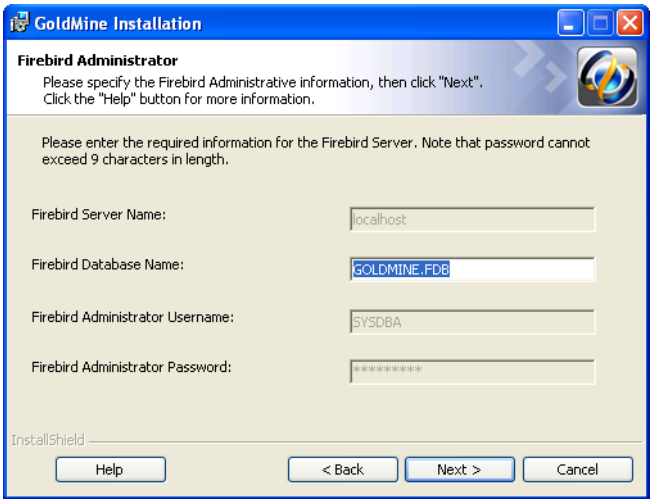

GoldMine Installation
Firebird Installation
Please specify which options you prefer:
Install Firebird Database Server and Client
Install Firebird Client
Install Firebird Database Server
you may optionally install the Firebird Server and Client, or if connecting to a remote Server, select the Firebird Client only.
InstallShield
Help
< Back
Next >
Cancel

Note: This dialog will not appear if either the Firebird Server or Client have already been installed.

16. Select **Install Firebird Database Server and Client**.
17. Click **Next**. The **Firebird Database Server** dialog box appears.


GoldMine Installation
Firebird Database Server
Please specify a location to install Firebird software and create the Firebird database. Also, please specify whether local or remote installation.
Local Firebird Database
Remote Firebird Database
Firebird Server and/or Client will be installed to the following location:
C:\Program Files\Firebird\
Enter the full path in which to create the Firebird database. If creating the database on a remote server, enter the local path on that machine. Note: The database file must be located on the machine's local drive, not a mapped drive or UNC path.
C:\Program Files\GoldMine\data
InstallShield
Help
< Back
Next >
Cancel

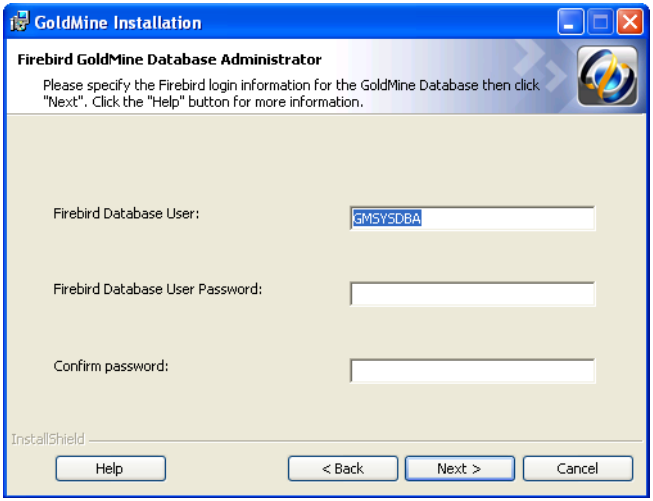
18. Select **Local Firebird Database**.
19. The **Firebird Server/Client** are installed to the drive where the OS is installed (in Program Files\Firebird\firebird_1_5 folder).
20. The **Firebird database** is installed locally on the Firebird server to **Program Files\ GoldMine\GoldMine\Data**. Accept the default or type an valid alternative path (such as <Firebird server> C:\Apps\GoldMine).
21. Click **Next**. The **Firebird Administrator** dialog box appears.



22. Accept the default or specify the appropriate information:
    - **Firebird Server Name:** Name of remote server.
    - **Firebird Database Name:** Name of new Firebird database (with FDB extension).
    - **Firebird Administrator Username:** username.
    - **Firebird Administrator Password:** password.

Note: For a local database these are pre-set initial values. For a remote database, enter the username and password to that database. To maintain security, you must change the user name and password after the installation is complete. See online Help for instructions.

23. Click **Next**. The **Firebird GoldMine Database Administrator** dialog box appears.



24. Accept the default or specify new database login for owner:
    - **Firebird Database User:** The default user **GMSYSDBA** is created.
    - **Firebird Database User Password:** Options are a) accept the default user and type a new password (write it down during setup), or b) type an existing user name. If you specify an existing user as owner, you must type that user's corresponding password before the installation proceeds (if authentication fails, the message "Unable to connect...." appears). Field has 8-character recognition limit.
    - **Confirm Password:** Retype password to confirm.
25. Click **Next**. The **Ready to Install the Program** dialog box appears.
26. Click **Install**. The **Installing GoldMine** dialog box appears. When finished, the **Installation Completed** dialog box appears.
27. Click **Finish**.

Note: The Welcome to GoldMine dialog box appears to begin the licensing process. See "Licensing Following Installation" on page 3-7.

Note: On most systems, the **Optimize OrgChart Wizard** dialog box will appear once the upgrade procedure is complete (see **GoldMine Online Help** for more information about Optimizing OrgCharts). The wizard will not appear

if the index that it creates already exists in the upgraded system's program files.

Upgrade Considerations

Use this upgrade process with GoldMine 5.0 or higher. If you are upgrading a prior version, you must upgrade to 5.x before upgrading to 8.0. If you are running 4.0 or earlier, please contact Customer Care at 800.776.7889 (Option 3).

CAUTION: Back up your existing GoldMine database and system before beginning the upgrade.

- In addition to the 65 MB of disk space required for installation, ensure you have at least 2½ times the size of your largest table in additional free space on your hard disk.

  Example: If your largest table is Conthist, which has an 85 MB .dbf and a 15 MB .dbt for 100 MB total, you should have 250 MB free disk space before continuing (2½ x 100 MB).

- A database conversion may be required when upgrading from earlier versions of GoldMine. This conversion occurs automatically when GoldMine is installed into the path of the existing gmw5.exe or gmw6.exe.

  CAUTION: If you are upgrading a **large Microsoft SQL Server database** (5GB of data or more), see **Appendix E** before proceeding with the upgrade. Certain computers (limited computing power) require manual steps to upgrade the database successfully.

- Undocked users should be on the same version of GoldMine as the site with which they sync. If you are upgrading the server but are not upgrading undocked computers until a later time, disable their sync sites in the GoldSync Administration Center on the server. Reactivate their site when the undocked computer is upgraded and is running the same version of GoldMine as the server.
- If you have a previous version of the GoldMine Link to Word or GoldMine Plus Microsoft Office, uninstall this version prior to

upgrading. The upgrade installs the new GoldMine Plus Microsoft Office installer file that is compatible with GoldMine 8.0.

- If you have a previous version of GoldMine Integration Services for Microsoft Outlook, uninstall this version prior to upgrading.

Upgrading a Server (SQL Database)

Be sure to review the "Installing GoldMine on Windows XP" on page 2-2.

CAUTION: If you are upgrading from a previous version of GoldMine, back up your existing GoldMine database and system before beginning the upgrade.

1. Log directly into the server as a local administrator.
2. The installation CD is set up to autorun when inserted into your CD-ROM drive or run the **gmsetup.exe** downloaded to your server installation of GoldMine during the Net-Update process. The **Welcome to the GoldMine Installation Wizard** dialog box appears.
3. Click **Next**. The **Readme** dialog box appears.
4. Click **Next**. The **License Agreement** dialog box appears.
5. Review the licensing information carefully; if you agree to the terms, select **I accept the terms In the license agreement**.

   Note: If you do not agree to the terms of the license agreement, select **I do not accept the terms in the license agreement**. Click **Cancel** to terminate the installation.

6. Accepting the terms of the agreement activates the subsequent check boxes. You must select both check boxes to continue with the installation.

   IMPORTANT: Select **I am an authorized agent and/or representative of the customer/end-user** and **I have read the terms and conditions stated above** to continue.

7. Click **Next**. The **Installation Type** dialog box appears.

Upgrading Remote Systems

This type of upgrade is for computers working disconnected from a GoldMine server but synchronizing with the main GoldMine server to update information—a remote Site or an Undocked computer.

If you are upgrading a Site, the Master installation provides the site administrator with the **gmsetup.exe**.

📖 See "Installing on a Server (SQL Database)" on page 2-7.

If updating an undocked computer, the Master installation provides the undocked computer user with the **gmsetup.exe**.

📖 See "Running an Undocked Computer Installation" on page 2-28.

IMPORTANT: If you are upgrading the server but are not upgrading a remote system until a later date, disable the site in the GoldSync Administration Center until it is running the same version of GoldMine as the server.

1. Upgrade the Master GoldMine site.
2. After upgrading the Master site, you can upgrade remote computers by sending them a **gmsetup.exe** installation file using one of these methods:
   - One-button Synchronization
   - CD-ROM
   - FTP site
   - E-mail
   - Accessible network drive
3. Remote users should run the installation CD or the **gmsetup.exe** on their computer following these upgrade instructions.
4. After remote users upgrade to the same version of GoldMine as the server, they can begin synchronizing again.

Licensing and Registration

Overview

GoldMine has a fully scalable licensing structure to meet the needs of individuals and organizations. As your business matures and GoldMine expands, your organization can change the licensing configurations.

General Licensing Information

The single, distributed Master License serves as the authentication mechanism for secure synchronization across the entire organization, and the License Manager keeps track of your licensing configurations.

Most organizations generally buy one license—a **Master License** with x number of seats. These seats can then be parsed to users in various combinations of sub-licenses. For example, an organization can create Site sub-licenses for their remote office(s) and Undocked sub-licenses for individual remote (mobile) users. One seat should always be set aside for administrators.

License Types

- **Master License:** This is the primary license. It determines what database types are supported by the master site as well as its synchronization capabilities. It is a precursor to executing any sub-licenses which stem from it.

  GoldSync and Outlook Integration licenses are included in E licenses.

  The licensing serial number schema for Master licenses was changed for the 7.0 release, but remains the same for sub-licenses. See "License Serial Number" on page 3-4.

- **Sub-licenses:** To issue, install GoldMine with a Master License on your organization's primary network. This ensures all sub-licenses maintain security and are authenticated properly during synchronization.

  The Undocked license (a special sub-license) is for remote users and can only be licensed for a single user. It can be sub-licensed from the main GoldMine system or from a Site sub-license.

- **Increases:** Previous increases for Corporate Edition, Standard Edition, and GoldSync (J, R, and N), are now facilitated by obtaining a new E or G license (which account for the increase and the Master license count).

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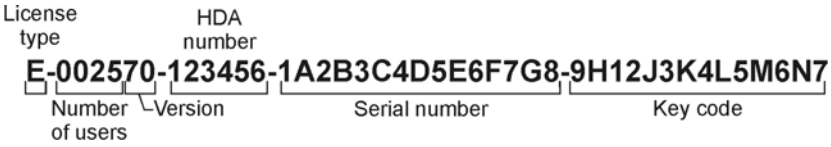
Master License		
E	**Premium Edition License**	Supports SQL databases and includes GoldSync
G	**GoldSync Master License**	GoldSync seats purchased separately and can be added to E-Licenses
O	**GoldMine Outlook Integration Services License**	Outlook integration purchased separately to increase number of users with E-License
Sub-licenses		
U	**Undocked License**	Single sub-license for a remote GoldMine user
S	**Site License**	Multiple-user sub-license for a remote office
Y	**GoldSync License**	GoldSync sub-license for a remote office

License Serial Number

The schema for the serial number has changed. Because of the new licensing schema, the GoldMine installer will not upgrade your license. This example illustrates what a GoldMine license serial number looks like:

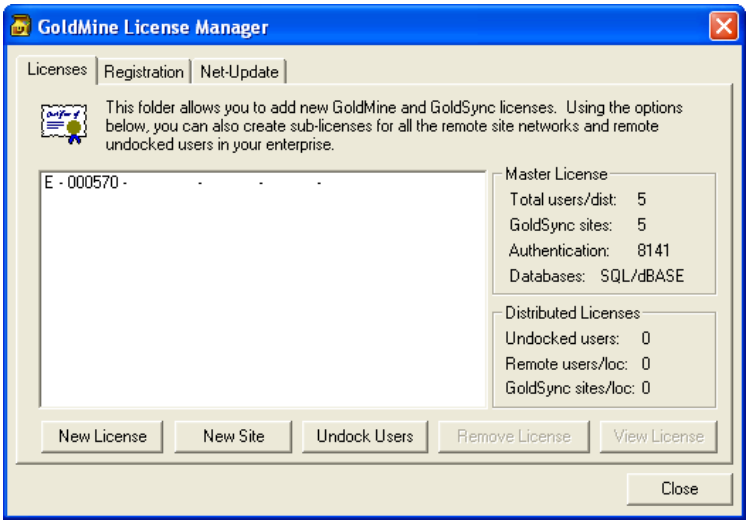


- **License type:** Alpha-prefix denotes the type of Master license.
- **Number of users:** First 4 numbers indicate the license count or seats available in the license. The license count determines the number of users who can log on to GoldMine at one time but does not limit the total number of named users.
- **Version:** A 2-digit version number.
- **HDA number:** Your 6-digit HDA number.
- **Serial number:** 15-character (alphanumeric) serial number uniquely identifying the license for an organization. It is used for registration and support and identifies all sub-licenses as part of the same organization. Collected in 3 groups of 5 characters during licensing.
- **Key code:** 15-character (alphanumeric) key code is a computer-generated check used by GoldMine to verify the license's validity. Collected in 3 groups of 5 characters during licensing.

Note: The license is required for the product to run. Keep the license number and key code in a safe place in the event it becomes necessary to reinstall the software.

License Manager

Initial licensing information is collected during installation. Subsequent changes and related management functions are handled through the **License Manager**.



From the GoldMine **Tools** menu, select **Configure>>License Manager**.

The central text box lists all installed licenses and any sub-licenses created from this location. Status is displayed along the right side. Buttons along the bottom allow you to add a **New License**, add a **New Site**, add an **Undocked User**, **Remove License**, or **View License**.

The database support of the Master License is inherited by the site sub-licenses distributed throughout the organization. GoldSync Synchronization capabilities can be distributed separately to sub-licenses.

IMPORTANT: Licensing information is stored in the license file, **License.bin**, created at the time you register. This file must exist only in the GoldMine root directory of each GoldMine installation.

📖 Additional License Manager information is provided in the online Help.

Licensing with a Master License

A GoldMine Premium Edition Master License begins with the alpha-prefix E (***Example:*** E-005070-111111...).

The E-license is usually a multi-user license for a server installation of GoldMine but may be a single-user license for a stand-alone computer.

An E-license includes a GoldSync license for each purchased GoldMine seat.

Remote site sub-licenses (S- and Y-licenses) and Undocked sub-licenses (U-licenses) are created from the E-license.

Type the **E-license** number and key code you received when you purchased the software.

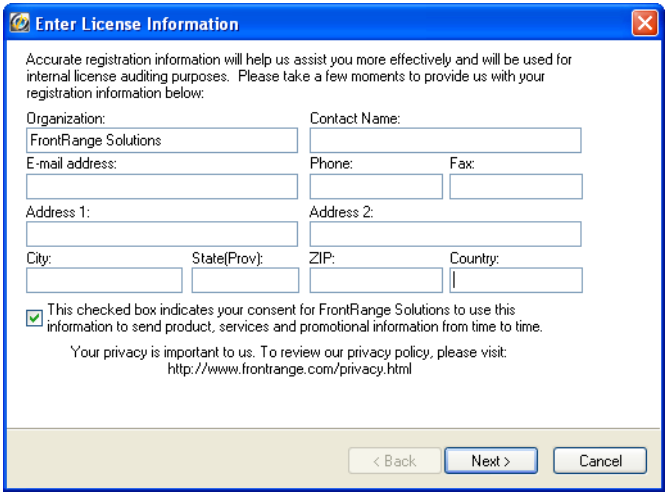
IMPORTANT: If you type an E-license serial number into the text boxes, the GoldSync text box area remains unavailable because GoldSync is included.

Licensing Following Installation

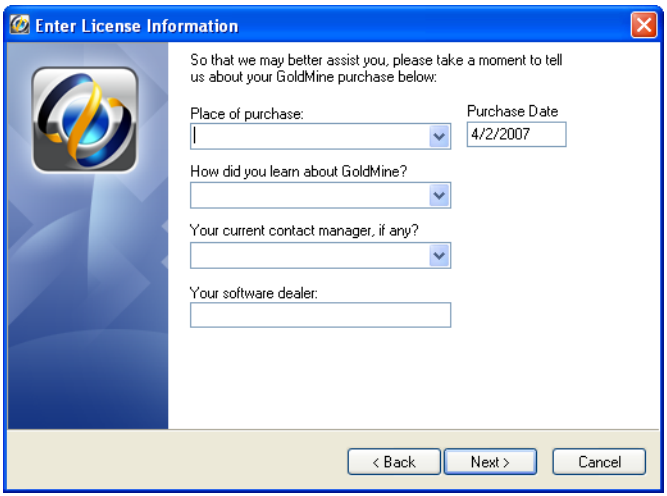
1. After the installation completes, Click **Finish**. The **licensing wizard** launches.

IMPORTANT: If you do not complete the license and registration information after installation, the licensing wizard launches prior to first use of GoldMine.

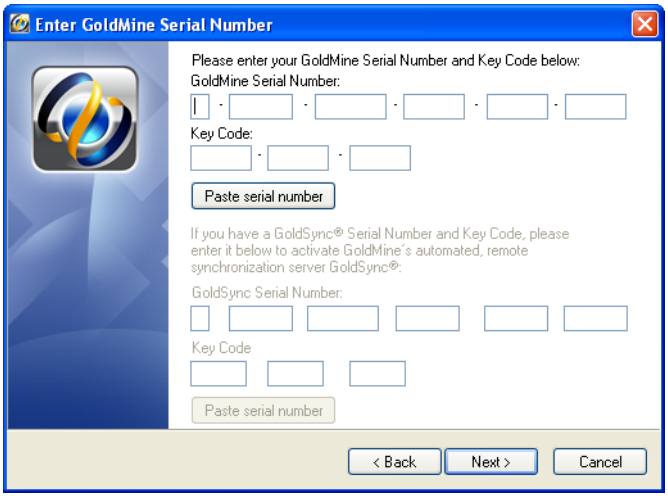
2. The **Enter License Information** dialog box appears.


Enter License Information
Accurate registration information will help us assist you more effectively and will be used for internal license auditing purposes. Please take a few moments to provide us with your registration information below:
Organization:
FrontRange Solutions
Contact Name:
E-mail address:
Phone:
Fax:
Address 1:
Address 2:
City:
State(Prov):
ZIP:
Country:
This checked box indicates your consent for FrontRange Solutions to use this information to send product, services and promotional information from time to time.
Your privacy is important to us. To review our privacy policy, please visit:
http://www.frontrange.com/privacy.html
< Back
Next >
Cancel

3. Provide your contact information in the designated text boxes to continue. All fields are **required**.
4. Select the check box to receive future product information. Clear the check box if you do not.
5. Click **Next**. The **Enter License Information** dialog box appears.


Enter License Information
So that we may better assist you, please take a moment to tell us about your GoldMine purchase below:
Place of purchase:
Purchase Date
4/2/2007
How did you learn about GoldMine?
Your current contact manager, if any?
Your software dealer:
< Back
Next >
Cancel

6. Complete the purchase information. These fields are optional.
7. Click **Next**. The **Enter GoldMine Serial Number** dialog box appears.


Enter GoldMine Serial Number
Please enter your GoldMine Serial Number and Key Code below:
GoldMine Serial Number:
Key Code:
Paste serial number
If you have a GoldSync® Serial Number and Key Code, please enter it below to activate GoldMine's automated, remote synchronization server GoldSync®.
GoldSync Serial Number:
Key Code
Paste serial number
< Back
Next >
Cancel

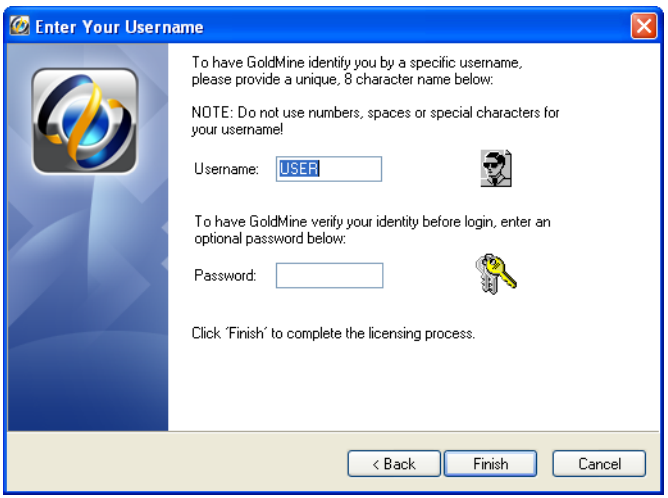
8. Type your GoldMine serial number and key code. Options appearing in this dialog box depend on type of license purchased.
9. Click **Next**. The **Import NT Server User Accounts** dialog box appears.

Import NT Server User Accounts
GoldMine can import the NT log-on accounts which are defined on your current NT domain server. Place a checkmark next to each user account you wish to import into GoldMine.
Administrator:
ASPNET: ASP.NET Machine Account
Guest:
IUSR_DU-TWR-DYETTER2: Internet Guest Account
IWAM_DU-TWR-DYETTER2: Launch IIS Process Accou
SQLDebugger: SQLDebugger
Optional password for imported names:
< Back
Next >
Cancel

10. Select each user account you want to import into GoldMine. If appropriate, type an optional password for imported names.

IMPORTANT: Imported users do not have “master” rights.

11. Click **Next**. The **Enter Your Username** dialog box appears.


Enter Your Username
To have GoldMine identify you by a specific username, please provide a unique, 8 character name below:
NOTE: Do not use numbers, spaces or special characters for your username!
Username:
USER
To have GoldMine verify your identity before login, enter an optional password below:
Password:
Click 'Finish' to complete the licensing process.
< Back
Finish
Cancel

12. Type a user name (eight characters or fewer). The password is optional. GoldMine requests these at log in. This user has Master Rights in GoldMine.

13. Click **Finish**. The **GoldMine Logon** dialog box appears.

14. Type the user name and password.
15. Click **OK** to launch GoldMine.

Creating Sub-licenses

After GoldMine is installed and licensed, you can parse seats to your end users with sub-licenses using the License Manager. You must have a Master License to create sub-licenses.

CAUTION: Plan before creating sub-licenses, keeping in mind each sub-license transfers seat availability which affects how many users can log in on the network system. For example, on the License tab of the License Manager, if the **Total users/dist:** shows a total number of seats and the total number of sub-licenses as "50\20," only 30 seats are available to users. At a minimum, one seat should always be set aside for administrators only.

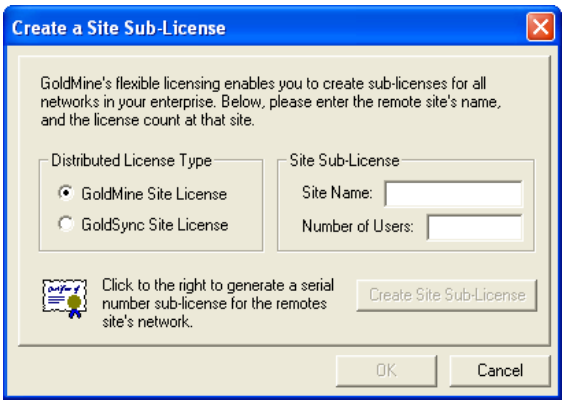
Creating Sub-licenses for Remote Offices

From a Master License, you can create sub-licenses for remote offices. Remote office sub-licenses can be a **Site License (S-license)** and/or a **GoldSync License (Y-license)**.

Each "S" and/or "Y" sub-license transfers seat availability from non-remote users. A minimum of one seat must remain available to non-remote users. For example, you must have at least 5 seats to make GoldMine available to 4 remote offices. Headquarters retains the fifth seat.

Note: When creating any sub-license, note the entire license number created by GoldMine. The sub-license includes the key code and additional information needed when licensing the remote computer. The information only displays in its entirety during the creation process.

1. From the **GoldMine** menu, select **Tools>>Configure>>License Manager**. The **License Manager** appears.
2. Click the **Licenses** tab.
3. Click **New Site**. The **Create a Site Sub-License** dialog box appears.


Create a Site Sub-License
GoldMine's flexible licensing enables you to create sub-licenses for all networks in your enterprise. Below, please enter the remote site's name, and the license count at that site.
Distributed License Type
GoldMine Site License
GoldSync Site License
Site Sub-License
Site Name:
Number of Users:
Click to the right to generate a serial number sub-license for the remotes site's network.
Create Site Sub-License
OK
Cancel

4. In the **Distributed License Type** area, select the site license you want to create—**GoldMine Site License (S-License)** for the number of seats the site needs or **GoldSync Site License (Y-License)** for the number of users who are synchronizing, including at least one for the site.

Tip: Write the sub-license number down or copy it to Windows Notepad. The sub-license number is needed for each remote computer installation. Send the remote site license number to the remote user who can type the license number during the GoldMine installation.

5. In the **Site Sub-License** area, type the site name and number of users.
6. Click **Create Site Sub-License**. The **Site-License for Remote Site** dialog box appears.
7. Review the information about the sub-license and click **I Agree**. The sub-license number for the site appears in the **Sub-license for Remote Site [Name of Site]** dialog box.
8. If you created a Site license, repeat the above process to create the necessary GoldSync license and select GoldSync Site License.

Note: GoldMine adds the sub-license to the list of licences on the Licenses tab of the License Manager.

Creating Sub-licenses for Undocked Users

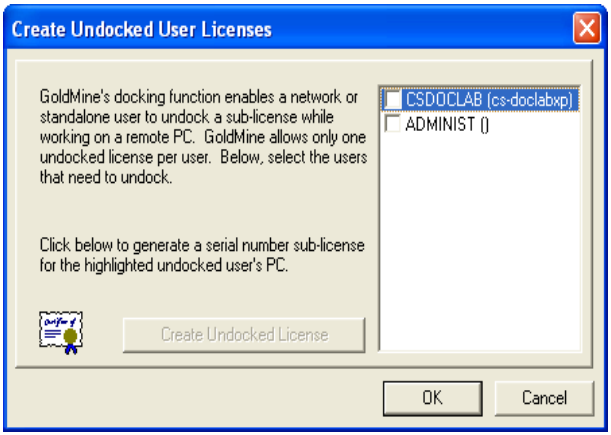
GoldMine has a sub-license for an individual user called an **Undocked License (U-License)**. This license type is created for users who work primarily with GoldMine at a remote location on a laptop, notebook, or home office computer but who may also need to log on to the network occasionally. Consider:

- Creating an undocked user decreases the available users of the network site (Master License or Site License) by one; however, when an undocked user logs on to the site from which they were sub-licensed, they do not take up an additional seat.
- Every user supported by the GoldMine license can have an Undocked license to work on a remote computer. For example, on a 5-user GoldMine system, 5 Undocked licenses can be created. This is in contrast to creating an "S" sub-license which requires one seat to remain available from the Master License.
- All undocked users, as well as the total number of users that make up the difference in the total number allowed by the Master License can log on to GoldMine. For example, on a 5-user GoldMine system with 3 undocked users, 3 undocked users plus 2 other users can log on to GoldMine.

WARNING: If you undock all users, only those users will be able to log in. If you have not assigned master rights to any of those undocked users, GoldMine administration cannot take place.

- When used in combination with GoldSync, administrators can synchronize security settings to undocked users including new passwords, menu items, and preferences in addition to data.
- To work on an undocked basis, users must have an Undocked license on their laptop. Create an Undocked license from the Master License or a Site license.

1. From the **GoldMine** main menu, select **Tools>> Configure>>License Manager**. The **License Manager** appears.
2. Click the **Licenses** tab and **Undock Users**. The **Create Undocked User Licenses** dialog box appears.


Create Undocked User Licenses
GoldMine's docking function enables a network or standalone user to undock a sub-license while working on a remote PC. GoldMine allows only one undocked license per user. Below, select the users that need to undock.
Click below to generate a serial number sub-license for the highlighted undocked user's PC.
CSDOCLAB (cs-doclabxp)
ADMINIST ()
Create Undocked License
OK
Cancel

3. Select the check box next to the user you want to create a sub-license for, and click **Create Undocked License**. The **Sub-Licenses** dialog box appears.
4. Review the information and click **I Agree**. The sub-license number for a remote user or an undocked user appears in the **Sub-license for Remote Site [Name of Site]** dialog box.

Tip: Write the sub-license number down or copy it to Windows Notepad. The sub-license number is needed for each remote computer installation. Send the remote site license number to the remote user who can type the license number during the GoldMine installation.

Licensing with Sub-licenses

Site License

A Site License is a multiple-user sub-license for a remote office and is designated with the alpha-prefix "S." You should have an **S-license** for each user at the remote site.

A GoldSync License (**Y-license**) is required only if you are using an S-license and want to synchronize using GoldSync. You should have one Y-license to synchronize with the Master License and additional Y-licenses for Undocked users synchronizing with your site.

Note: Y licenses are not entered in the Enter GoldMine Serial Number dialog box. Only S licenses are entered during registration (the GoldSync Section remains disabled). Clicking **Next** displays an **ALERT: Suggested Action(s)!** if you try to enter Y licenses in the Enter GoldMine Serial Number dialog box.

If this installation of GoldMine includes its own GoldSync sites, you may enter the applicable Y-type sub-licenses to properly configure synchronization for this system.

1. To configure applicable sub-license sites, select **Tools>>Configure>> License Manager** to enter your Y-type license.
2. In the **GoldMine Serial Number** text boxes, type the **S-license**, **Key Code**, and **Site Code** you created in the License Manager of the main GoldMine system.
3. In the **GoldSync Serial Number** text boxes, type the **Y-license**, **Key Code**, and **Site Code** you created in the License Manager.

Undocked License

Undocked licenses are sub-licenses created from a Master License or a Site license and are designated by the letter "U." This license type is created for users who work with GoldMine at another location, on a laptop, or on a workstation disconnected from the server copy of GoldMine.

Type the **U-license, Key Code,** and **Site Code** created in the License Manager.

For more on licensing, see GoldMine online Help.

Configuring

Overview

After installation, system administrators must configure GoldMine to meet the needs of the organization. Some preliminary setup is presented in this chapter. Additional configuration steps are presented in the online Help.

Configuration Considerations

In developing a GoldMine deployment strategy, the GoldMine administrator must carefully plan how the GoldMine database should run and determine who is going to use it.

- Creating users, user groups, security rights, and preferences including menu rights
- Changing field labels
- Creating user-defined fields and tabs
- Setting up expanded details
- Generating and modifying F2 Lookup lists

To enhance GoldMine, configure other areas:

- Automated Processes
- Reports

To import existing databases into GoldMine, plan the migration by asking yourself:

- Is it essential to keep all existing data?
- How out of date is the data?
- Are all fields in the existing database required in GoldMine?

For details on the procedures in these configuration points, see the Administration item in the GoldMine online Help Table of Contents, accessed by selecting **Help>>Help Topics** on the GoldMine menu bar.

Placing a Custom Image in the Logon Window

To display your organization's logo or other graphic on GoldMine's logon screen correctly, the file must be a bitmap within a size limit of 150 x 250 pixels. The bitmap cannot exceed 150x250 pixels or 150x177 pixels when using a D-license with a G-License.

Note: GM.ini is a special initialization file that stores settings that apply globally to all users running the same installation of GoldMine.

Place the bitmap file in the root GoldMine directory. Using a text editor such as Windows Notepad, open GM.ini. Under the **[GoldMine]** section, add this line:

UserLogo=<path\filename>

For example, if you place the graphics file MyLogo.bmp in your GoldMine directory, type this statement:

UserLogo=C:\GoldMine\MyLogo.bmp

Save GM.ini, then exit the text editor. Open GoldMine to display the changed login screen.

Granting Access Privileges in Windows XP

Overview

Microsoft Windows XP Professional has enhanced system security restricting access to applications to all users except the installing user. Having a Windows XP logon does not grant access to an application.

Access privileges must be granted to any additional users who want to use an application on the system. To do this, you must:

- Change GoldMine ownership
- Grant permission to use GoldMine

Note: If upgrading from GoldMine 5.7 (Business Contact Manager) installed on Windows XP Professional, consult your GoldMine 5.7 documentation regarding the “realini” setting in the GM.ini file.

Changing GoldMine Ownership in Windows XP

Windows XP (Professional version) enhances system security by granting access to installed applications only to the installing user.

If GoldMine was installed on your system using a different Windows XP logon user name and password and you do not know the Windows XP logon that was used, you can change the permission settings with an administrator-level account.

CAUTION: If running Window XP, Windows 2000 Professional, Windows 2000 Server, or Windows 2003 Server, you must be logged on as a Power User or local administrator or be part of a Power User or administrator group. Consult Microsoft Windows online Help.

1. Log on as an administrator or as a user with equivalent rights.
2. Navigate to **Program Files\ GoldMine**. Right-click to display the local menu, then select **Properties**.
3. Click the **Security** tab.
4. Click the **Advanced** button.
5. Click the **Owner** tab.
6. In the **Change Owner To** area, select the user you want to make the owner.
7. Select **Replace owner on subcontainers and objects**.
8. Click **OK**.
9. On the **GoldMine Properties** dialog box, click **OK** to save and close.

Granting Permission to Use GoldMine in Windows XP

Windows XP's enhanced security requires the administrator to grant privileges to each additional user who wants to use an application on the system.

CAUTION: If running Window XP, Windows 2000 Professional, Windows 2000 Server, or Windows 2003 Server, you must be logged on as a Power User or part of a Power User group. Consult Microsoft Windows online Help.

1. Navigate to **Program Files\ GoldMine**. Right-click to display the local menu, then select **Properties**.
2. Click the **Sharing** tab.
3. Select **Share this folder**.
4. Click **Permissions**.
5. On the **Share Permissions** tab, select **Add**.
6. Select the user or user group to grant access to.
7. Click **OK** to return to the **Share Permissions** window.
8. Select the data access permissions you want to allow or deny to the selected users or user groups. GoldMine users must have full control. Click **OK**.
9. Click the **Security** tab.
10. In the **Group or user names** area, select the users you want to define access privileges for.
11. Select the GoldMine application permissions you want to allow or deny to the user or user group. GoldMine users must have full control.
12. Click **OK**.

Firebird Information

Overview

Firebird is an open-source SQL solution. When you select a Firebird database during installation of GoldMine 8.0, a working copy of Firebird 1.5 is installed. See "Installing on a Server (Firebird Database)" on page 2-15.

Obtain the source code and documentation for Firebird from the downloads page at **http://www.ibphoenix.com**.

After GoldMine installation, the license files can be found in the **Program Files\Firebird\Firebird_1_5** folder.

Obtain a copy of this source code license from the Firebird Project Web site at: **http://www.firebirdsql.org/index.php?op=doc&id=idpl**.

Minimum Firebird 1.5 Client Install

This appendix describes how to run Firebird 1.5-based applications with the minimum client installation required.

DLL Sharing and Access

- **fbclient.dll:** Give your application access to the Firebird client library, fbclient.dll by placing the fbclient.dll in the same directory as your application's .exe file.
- **msvcp60.dll and msvcrt.dll:** Give fbclient.dll access to these dll's. Both are delivered with the Windows installation of Firebird; if you have a Firebird server installed on your development computer, find these dll's in the bin directory of your Firebird installation.
  - **msvcp60.dll** can remain in your application directory.
  - **msvcrt.dll** (Microsoft Visual C/C++ RunTime) is a part of Windows and resides in the **Windows\System** directory on Win9x computers and in **Windows\System32** on NT-based computers (NT4, W2K, XP, 2003).

Note: For Workstation installations with Firebird, use Option 2 (see "Running a Workstation Installation" on page 2-23).

Delphi, IbObjects

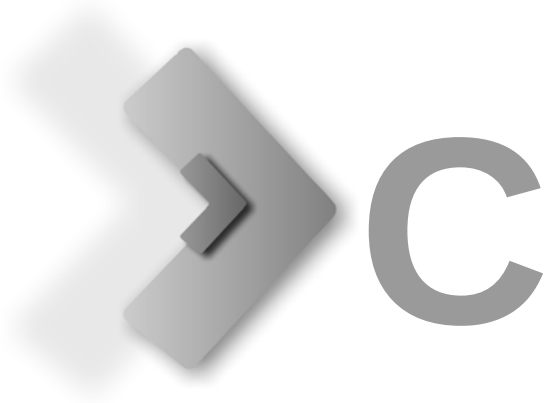
A “normal” InterBase access library uses gds32.dll as the client library. Firebird's client library is named fbclient.dll. When you use IbObjects (www.ibobjects.com), you can set another client library name.

- Include IB_Constants.pas as the first unit in your USES clause
- Place the following line in the INITIALIZATION part of your Unit: IB_Constants.IB_GDS32 := 'fbclient.dll';

  This line must be executed before the first database connect is performed.

Using Firebird With The Windows XP SP2 Firewall

The firewall included with Windows XP SP2 blocks port 3050, which the Firebird databases use. If you use a Firebird database and cannot access GoldMine from a workstation, either disable the Windows firewall or adjust your security settings to enable port 3050. You can adjust your Windows Firewall settings from the Security Center on the Control Panel.



Installing Microsoft SQL Server 2005

Overview

The GoldMine Server Setup requires you to install Microsoft SQL 2005 before installing GoldMine.

📖 The Microsoft SQL Server CD included with your GoldMine Corporate Edition package provides complete installation instructions in the Microsoft online Help.

The following instructions include installation procedures and settings pertinent to GoldMine but should not be considered a SQL Server administrator's guide. Only experienced SQL administrators should configure SQL Server with anything other than the settings described in these instructions.

Installing Microsoft SQL Server 2005

The server on which you are installing Microsoft SQL Server 2005 *must* have one of the following operating systems: Microsoft Windows 2000 Server with SP4 or later; Windows 2000 Professional Edition with SP4 or later; Windows XP with SP2 or later; Windows Server 2003 Enterprise Edition, Standard Edition, or Datacenter Edition with SP1 or later; Windows Small Business Server 2003 with SP 1 or later.

1. Insert the Microsoft SQL Server 2005 Installation CD into the CD/DVD drive of the computer on which you are installing SQL.

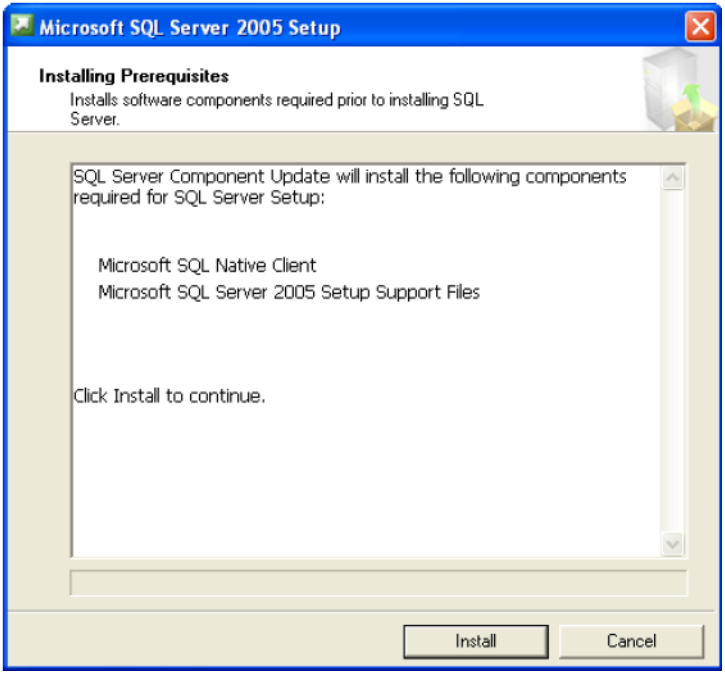
Note: The SQL Server 2005 Installation CD is set up to autorun when inserted into your CD/DVD drive. If autorun is not enabled, select Run from the Start button on the Windows taskbar, and then type x:\autorun.exe (where "x" is the letter of the CD/DVD drive).

The main window appears.

SQL Server 2005 (Disc 1 of 2)
Start
Prepare
Review hardware and software requirements
Read the release notes
Install SQL Server Upgrade Advisor
Install
Server components, tools, Books Online, and samples
Run the SQL Native Client Installation Wizard
Other Information
Browse this CD
Visit the SQL Server website
Read the SQL Server license agreement
Exit
Launch the Installation Wizard to install server components, management tools, development tools, Books Online, and samples. This selection will require both SQL Server 2005 installation discs.
Microsoft SQL Server 2005
Standard Edition

2. Select **SQL Server 2005 Components...**. The **End User License Agreement** window appears. To install SQL Server 2005, you must accept the terms of the End User License Agreement.

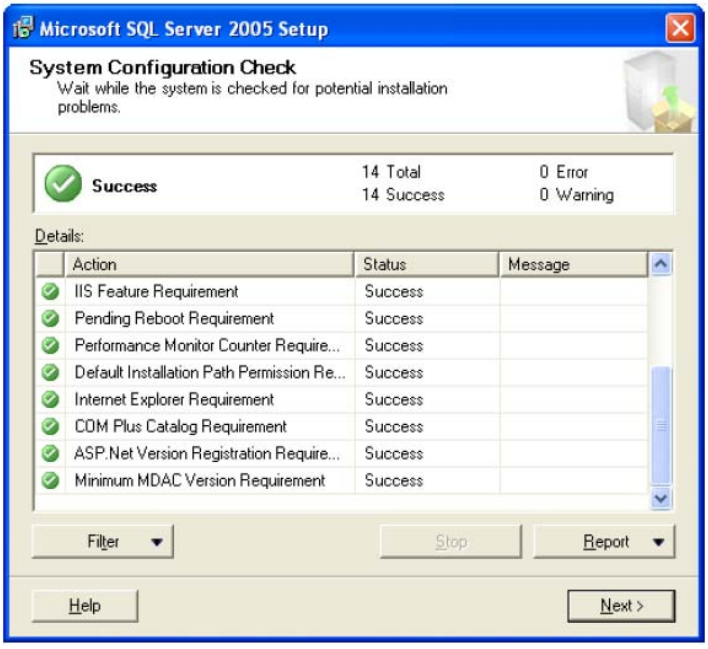
3. When you have reviewed and accepted the terms, click **Next**. The **Installing Prerequisites** window appears.


Microsoft SQL Server 2005 Setup
Installing Prerequisites
Installs software components required prior to installing SQL Server.
SQL Server Component Update will install the following components required for SQL Server Setup:
Microsoft SQL Native Client
Microsoft SQL Server 2005 Setup Support Files
Click Install to continue.
Install
Cancel

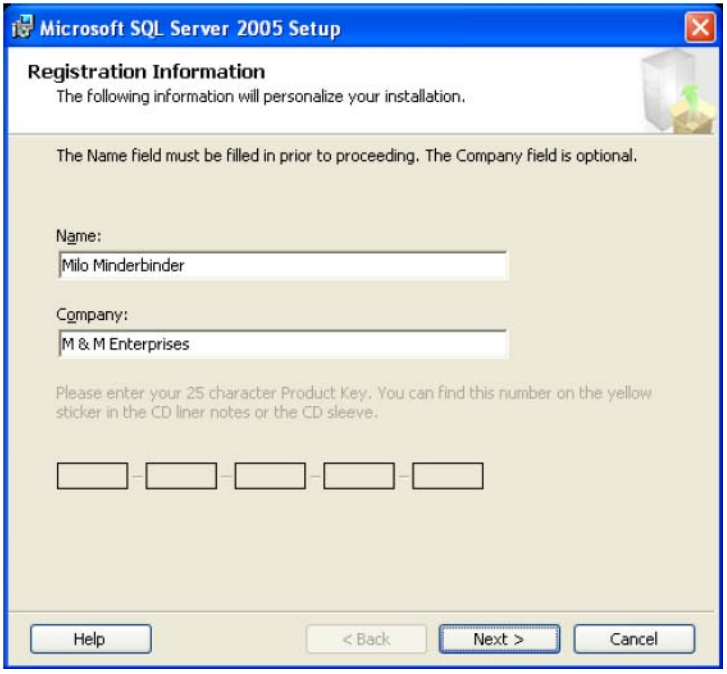
4. Click Install. After the software prerequisites are installed, click **Next**. The **Welcome** window appears.

Microsoft SQL Server 2005 Setup
Welcome to the Microsoft SQL Server Installation Wizard
Setup will help you install, modify or remove Microsoft SQL Server. To continue, click Next.
< Back
Next >
Cancel

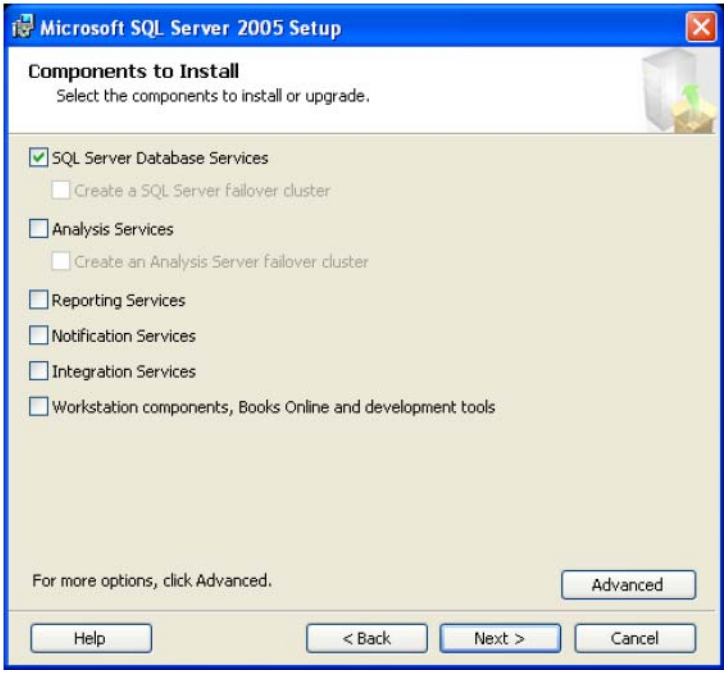
5. Click **Next**. The **System Configuration Check** window appears.



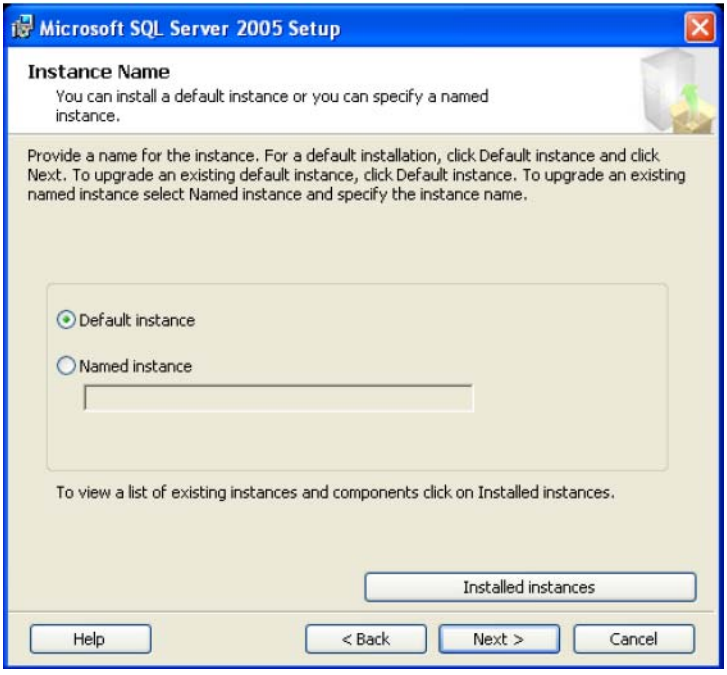
6. When the system configuration check is complete, click **Next**. The **Registration Information** window appears.


Microsoft SQL Server 2005 Setup
Registration Information
The following information will personalize your installation.
The Name field must be filled in prior to proceeding. The Company field is optional.
Name:
Milo Minderbinder
Company:
M & M Enterprises
Please enter your 25 character Product Key. You can find this number on the yellow sticker in the CD liner notes or the CD sleeve.
Help
< Back
Next >
Cancel

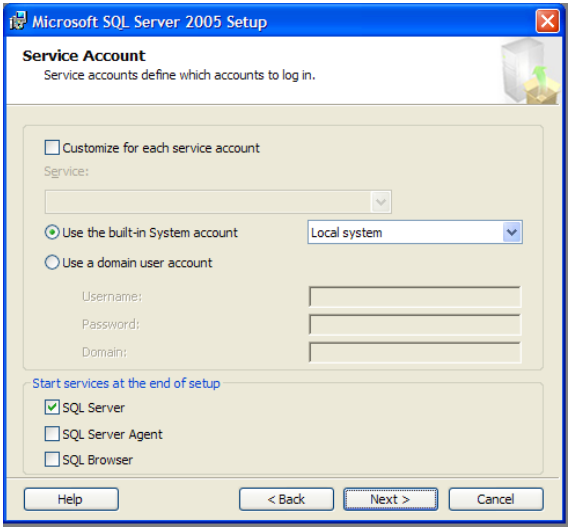
7. Click **Next**. The **Components to Install** window appears.



8. Select **SQL Server Database Services** and **Workstation components, Books online and developmental tools**, then click **Next**. The **Instance Name** window appears.

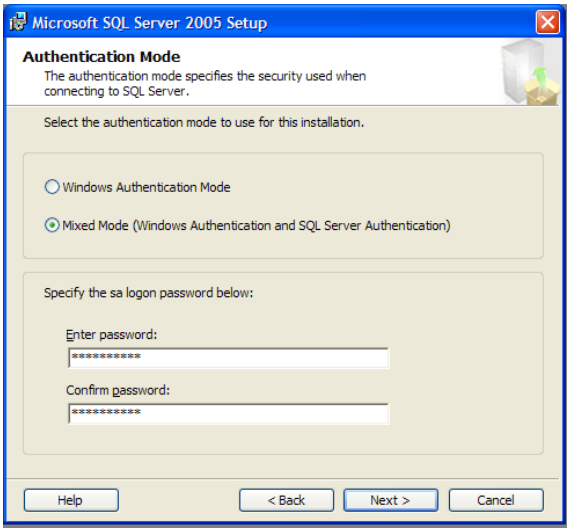

Microsoft SQL Server 2005 Setup
Instance Name
You can install a default instance or you can specify a named instance.
Provide a name for the instance. For a default installation, click Default instance and click Next. To upgrade an existing default instance, click Default instance. To upgrade an existing named instance select Named instance and specify the instance name.
Default instance
Named instance
To view a list of existing instances and components click on Installed instances.
Installed instances
Help
< Back
Next >
Cancel

9. Leave **Default** selected. Click **Next**. The **Service Accounts** dialog box appears.

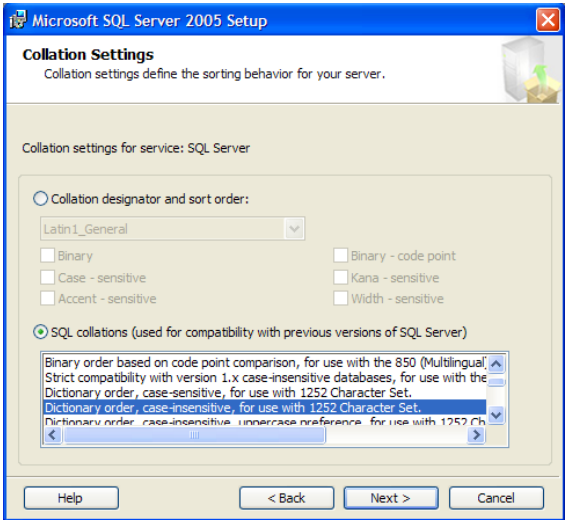


10. Select **Use the built-in sytem account >> Local System.** Under **Start services at the end of setup**, check **SQL Server**.

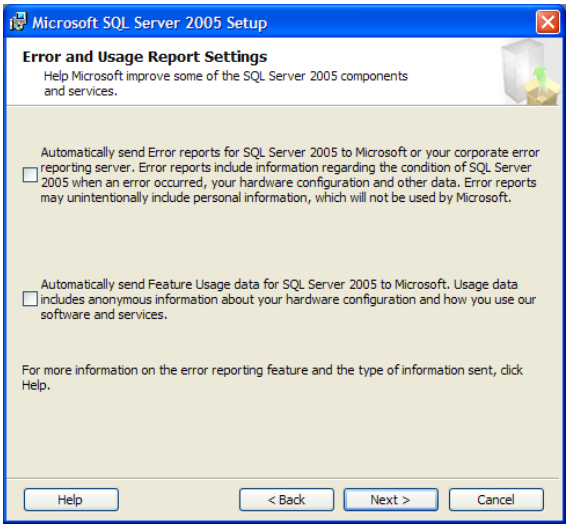
11. Click **Next**. The **Authentication Mode** dialog box appears.


Microsoft SQL Server 2005 Setup
Authentication Mode
The authentication mode specifies the security used when connecting to SQL Server.
Select the authentication mode to use for this installation.
Windows Authentication Mode
Mixed Mode (Windows Authentication and SQL Server Authentication)
Specify the sa logon password below:
Enter password:
Confirm password:
Help
< Back
Next >
Cancel

12. Select **Mixed Mode** and enter an sa logon password. Click **Next**. The **Collation Settings** window appears.

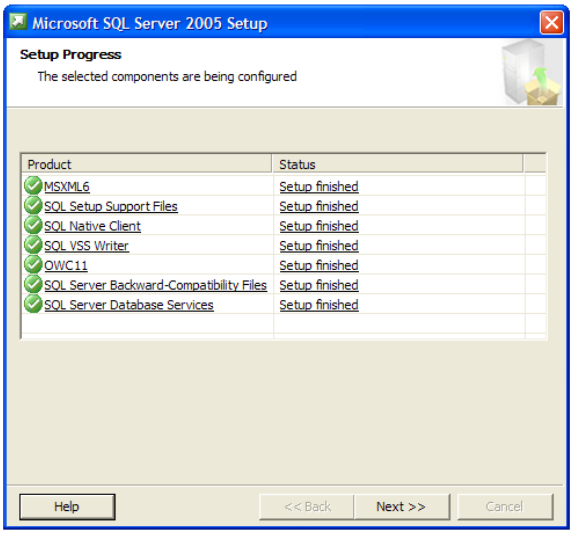

Microsoft SQL Server 2005 Setup
Collation Settings
Collation settings define the sorting behavior for your server.
Collation settings for service: SQL Server
Collation designator and sort order:
Latin1_General
Binary
Binary - code point
Case - sensitive
Kana - sensitive
Accent - sensitive
Width - sensitive
SQL collations (used for compatibility with previous versions of SQL Server)
Binary order based on code point comparison, for use with the 850 (Multilingual)
Strict compatibility with version 1.x case-insensitive databases, for use with the
Dictionary order, case-sensitive, for use with 1252 Character Set.
Dictionary order, case-insensitive, for use with 1252 Character Set.
Help
< Back
Next >
Cancel

13. From the SQL collations, choose the default. The **Error and Usage Report Settings** window appears.

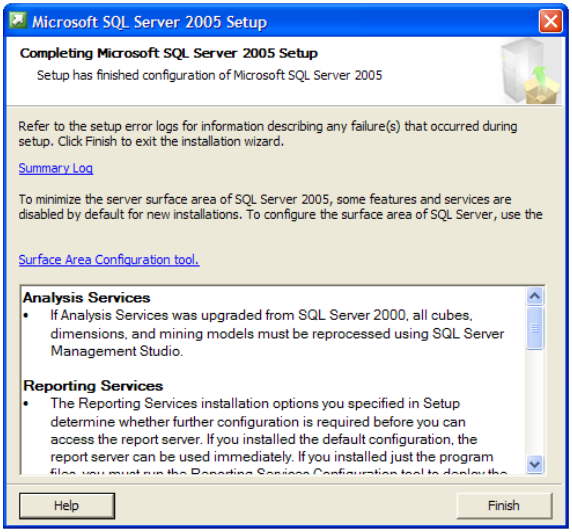

Microsoft SQL Server 2005 Setup
Error and Usage Report Settings
Help Microsoft improve some of the SQL Server 2005 components and services.
Automatically send Error reports for SQL Server 2005 to Microsoft or your corporate error reporting server. Error reports include information regarding the condition of SQL Server 2005 when an error occurred, your hardware configuration and other data. Error reports may unintentionally include personal information, which will not be used by Microsoft.
Automatically send Feature Usage data for SQL Server 2005 to Microsoft. Usage data includes anonymous information about your hardware configuration and how you use our software and services.
For more information on the error reporting feature and the type of information sent, click Help.
Help
< Back
Next >
Cancel

14. If you wish MSSQL Server 2005 to automatically send your error messages and usage reports to Microsoft, check the appropriate box. Otherwise, leave them blank. Click **Next**. The **Ready to Install** window appears.

15. Click **Next** to proceed with the installation. The **Setup Progress** window appears.



16. When the installer completes the setup process, click **Next**. The **Completing Microsoft SQL Server 2005 Setup** window appears.


Microsoft SQL Server 2005 Setup
Completing Microsoft SQL Server 2005 Setup
Setup has finished configuration of Microsoft SQL Server 2005
Refer to the setup error logs for information describing any failure(s) that occurred during setup. Click Finish to exit the installation wizard.
Summary Log
To minimize the server surface area of SQL Server 2005, some features and services are disabled by default for new installations. To configure the surface area of SQL Server, use the
Surface Area Configuration tool.
Analysis Services
If Analysis Services was upgraded from SQL Server 2000, all cubes, dimensions, and mining models must be reprocessed using SQL Server Management Studio.
Reporting Services
The Reporting Services installation options you specified in Setup determine whether further configuration is required before you can access the report server. If you installed the default configuration, the report server can be used immediately. If you installed just the program
Help
Finish

17. Click **Finish** to exit the installation wizard.

18. Select **Start>>All Programs>> Microsoft SQL Server 2005>>Configuration Tools>>SQL Server Configuration Manager**. The SQL Server Configuration Manager launches.
19. On the left pane, expand the **SQL Server 2005 Network Configuration** section, and select **Protocols for MSSQLSERVER**.
20. On the right pane, locate and select the protocol name **Named Pipes**.
21. Right-click on **Named Pipes** and select **Enable**. The following warning message appears:

    Any changes made will be saved, they will not take effect until the service is stopped and restarted.

    Select **OK**.
22. Exit the **SQL Server Configuration Manager**.
23. In Windows, go to **Start>>Control Panel>>Administrative Tools>>Computer Management**.
24. Expand **Services and Applications** and select **Services**.
25. Stop and restart the service **SQL Server (MSSQLSERVER)**.

Note: You may need to explicitly configure the TCP transport as part of the installation process.

Troubleshooting SQL Errors when Installing GoldMine

If you receive an error message such as **MSSQL Login Failed** during the installation of GoldMine, check the following:

- ***Is the SQL server running? If not, start SQL Server.***

  Open the MSSQL Enterprise Manager and find **SQL Server Enterprise Manager**. Expand the servers until you see your server name. Right-click your server name and select **Start** in the local menu.

- ***Is the SQL administrative name and password you typed when installing GoldMine different from the name and password in SQL? Are you using* sa *with no password, or did you change it in SQL?***

  Open the SQL Server Enterprise Manager. Expand Microsoft SQL Server and then expand SQL Server Groups. Right-click your server name and select **Edit SQL Server Registration properties**. Verify the login name and password.

- ***When you installed SQL, did you select Mixed Mode for the authentication mode?***

  If you do not know, go to the server name in the MSSQL Enterprise Manager. Expand Microsoft SQL Server and then expand SQL Server Groups. Right-click your server name and select **Properties**. Select the **Security** tab. Select **SQL Server and Windows**. Stop and restart SQL Server. The installation continues.

Installing Management Intelligence

Overview

Whether you work in support, sales, or marketing, Manager's Console and Answer Wizard take all the information collected from front line contacts—including call histories, open support tickets, and forecasts—and deliver that information to the rest of the organization. These tools track and disseminate information, they actually transform the information in your company into an asset.

- **Manager's Console:** Manager's Console provides at-a-glance summaries of the overall status of a Support Center or sales department. It allows managers to proactively review and manage critical business issues and facilitate future responses to recurring problems.
- **Answer Wizard:** Answer Wizard is a management-reporting tool for a supervisor or manager. Answer Wizard not only provides immediate answers to the questions managers are asking, but also coaches them to understand the additional questions they should ask.

Installing Management Intelligence

Management Intelligence can only be installed from the Installation CD. This CD is set up to autorun when inserted into your CD-ROM drive.

Note: If autorun is not enabled, select Run from the Start button on the Windows taskbar, and type: x\:setup.exe (where "x" is the letter of your CD-ROM drive).

The **CD Browser** initiates the installation process, allowing you to install, browse the CD, view Documentation, or exit.

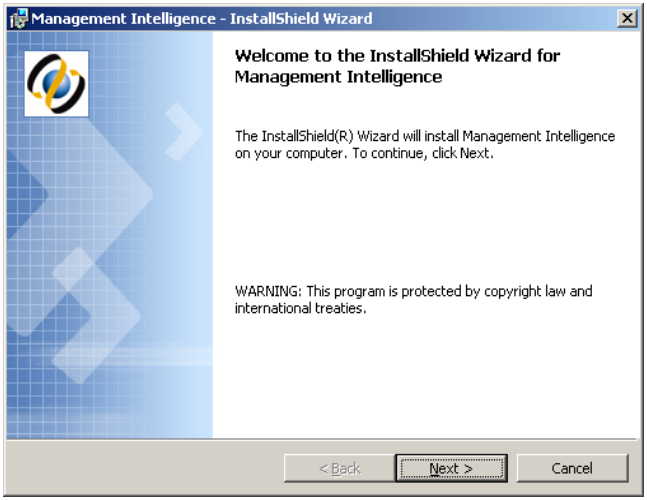
Available from the **Documentation** browser are the ReadMe and a PDF copy of this Installation Guide. Documentation is also available from the Help menu in most modules.

The **Installation Wizard** walks you through the installation process step by step. Windows and dialog boxes clearly outline important information, features, and directions. To navigate through the Installation Wizard, follow the directions in the windows and dialog boxes. To cancel the installation and exit the wizard at any time, click Cancel.

1. Insert the Installation CD into your CD-ROM drive. The **CD Browser** appears.

2. Select **Install Management Intelligence**.

The **Management Intelligence Installation Wizard** appears.


Management Intelligence - InstallShield Wizard
Welcome to the InstallShield Wizard for Management Intelligence
The InstallShield(R) Wizard will install Management Intelligence on your computer. To continue, click Next.
WARNING: This program is protected by copyright law and international treaties.
< Back
Next >
Cancel

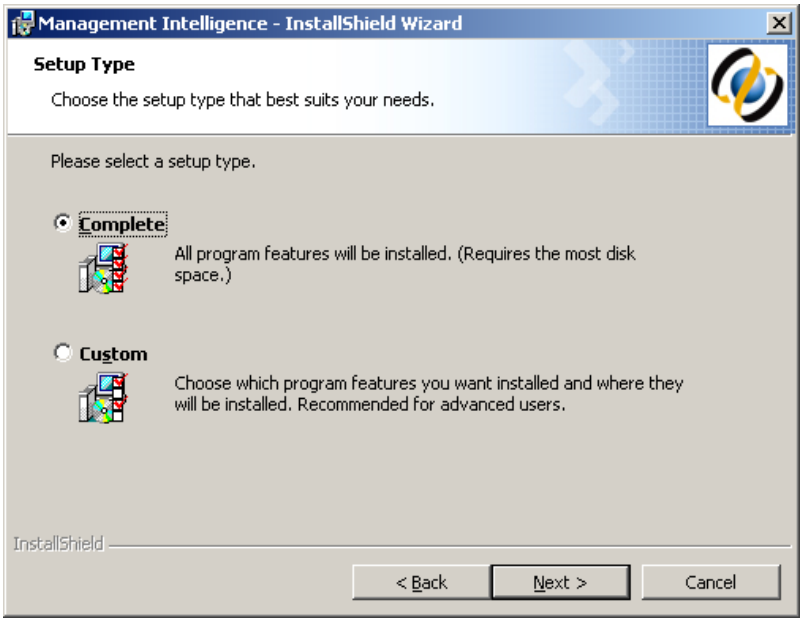
3. Click **Next**. The **Readme** dialog box appears.
4. Click **Next**. The **License Agreement** dialog box appears.
5. Review the licensing information carefully; if you agree to the terms, select **I accept the terms In the license agreement**.

Note: If you do not agree to the terms of the license agreement, select **I do not accept the terms in the license agreement**. Click **Cancel** to terminate the installation.

6. Accepting the terms of the agreement activates the subsequent check boxes. You must select both check boxes to continue with the installation.

IMPORTANT: Select **I am an authorized agent and/or representative of the customer/end-user** and **I have read the terms and conditions stated above** to continue.

7. Click **Next**. The **Setup Type** dialog box appears.


Management Intelligence - InstallShield Wizard
Setup Type
Choose the setup type that best suits your needs.
Please select a setup type.
Complete
All program features will be installed. (Requires the most disk space.)
Custom
Choose which program features you want installed and where they will be installed. Recommended for advanced users.
InstallShield
< Back
Next >
Cancel

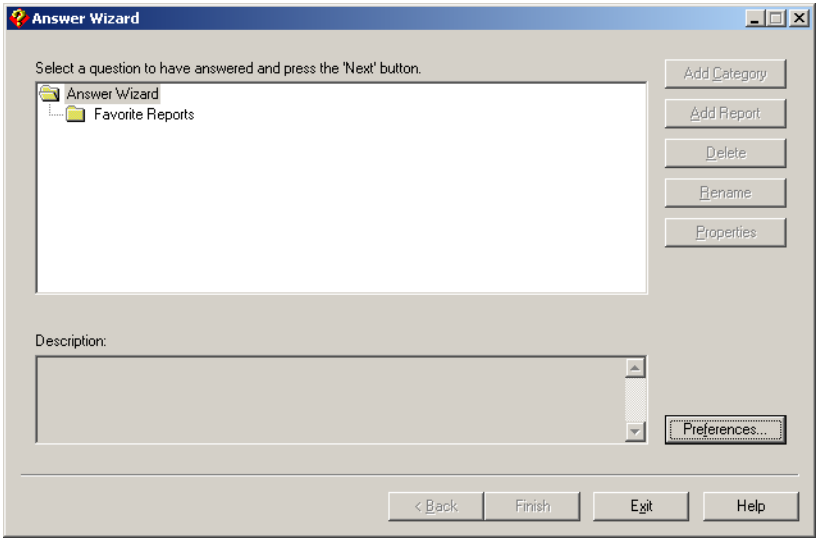
8. Select **Complete**.
9. Click **Next**. The **Ready to Install the Program** dialog box appears.
10. Click **Install**. The **Installing GoldMine** dialog box appears. When finished, the **Installation Completed** dialog box appears.
11. Click **Finish**.

Initial Setup

Manager's Console and Answer Wizard are installed. Next, launch Answer Wizard to configure the data sources and load the reports.

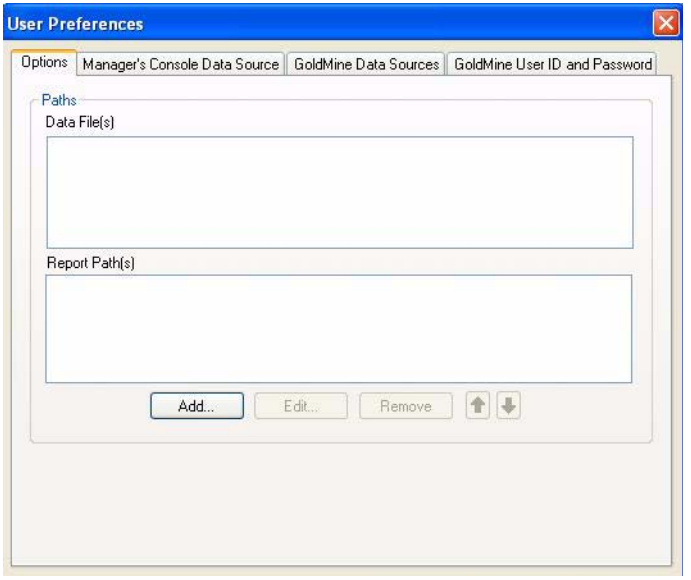
Establishing the ODBC

1. From **Start**, select **Programs>>GoldMine>>Answer Wizard**. The **Answer Wizard** main window appears.

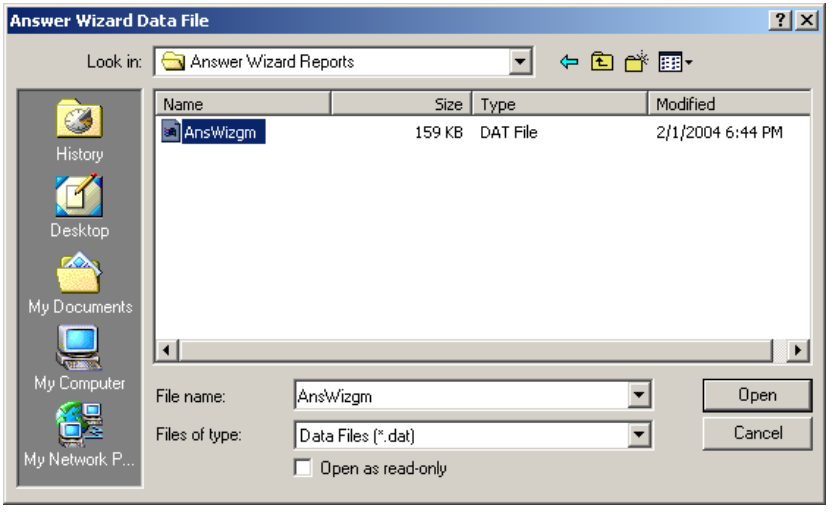


2. Click **Preferences**.

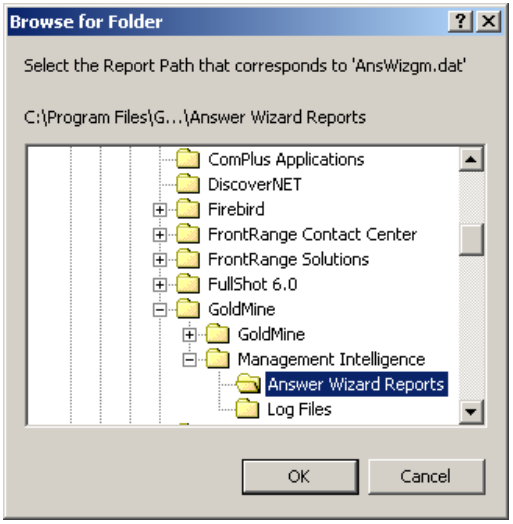
The **User Preferences** dialog box appears.



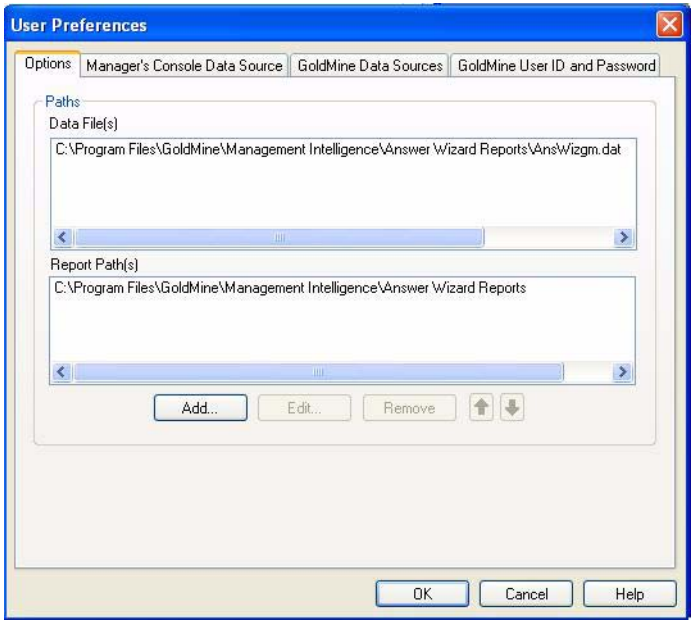
3. Use the **Options** tab to set the paths to the data file and reports. Click **Add**. The **Answer Wizard Data File** dialog box appears.



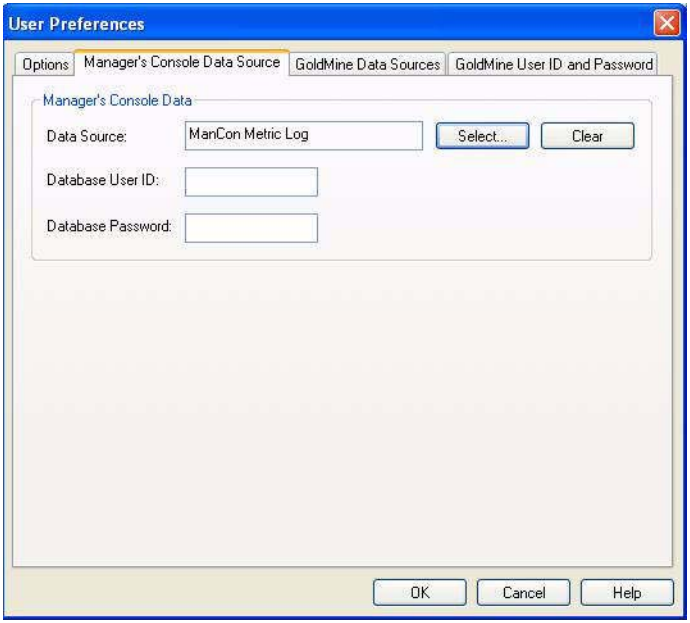
4. Navigate to the **AnsWizgm.dat** file, located in the **GoldMine\Management Intelligence\Answer Wizard Reports** folder.
5. Click **Open**. The **Browse for Folder** dialog box appears.



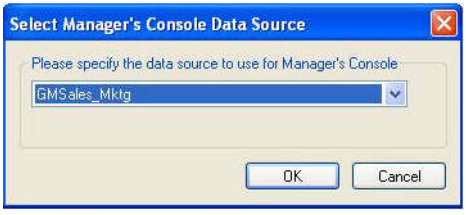
6. Verify the path is correct and click **OK**. The **User Preferences** dialog box reappears with paths defined.



7. Click the **Manager's Console Data Source** tab.

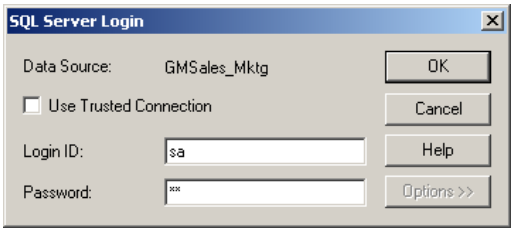


8. Click **Select**. The **Select Manager's Console Data Source** dialog box appears.

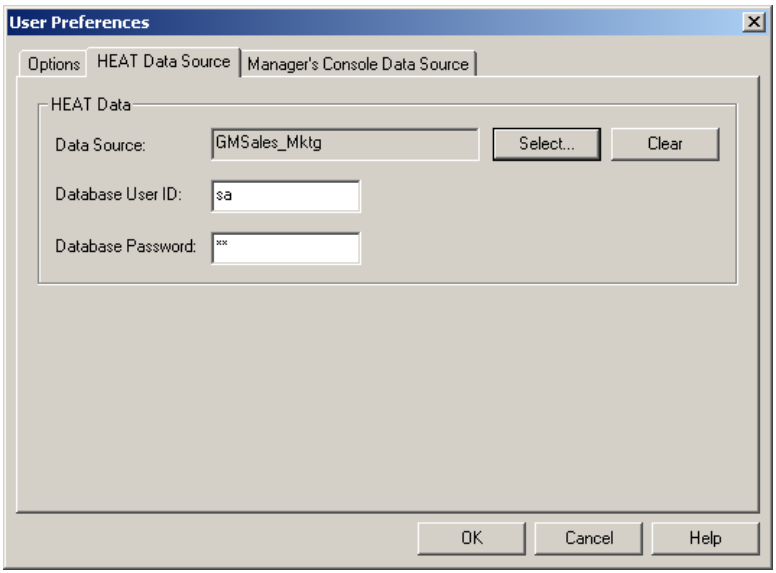


9. In the drop-down list, select **GMSales_Mktg**.

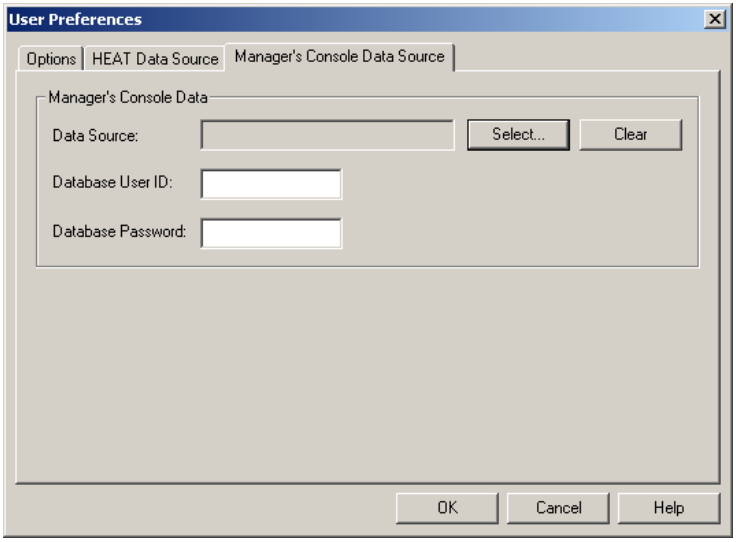
10. Click **OK**. The **SQL Server Login** dialog box appears.



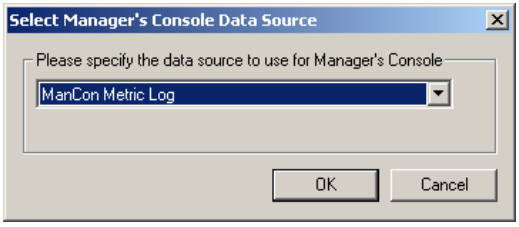
11. Type the **Login ID** and **Password** for SQL Server.
12. Click **OK**. The **HEAT Data Source** tab reappears.



13. Click the **Manager's Console** tab.

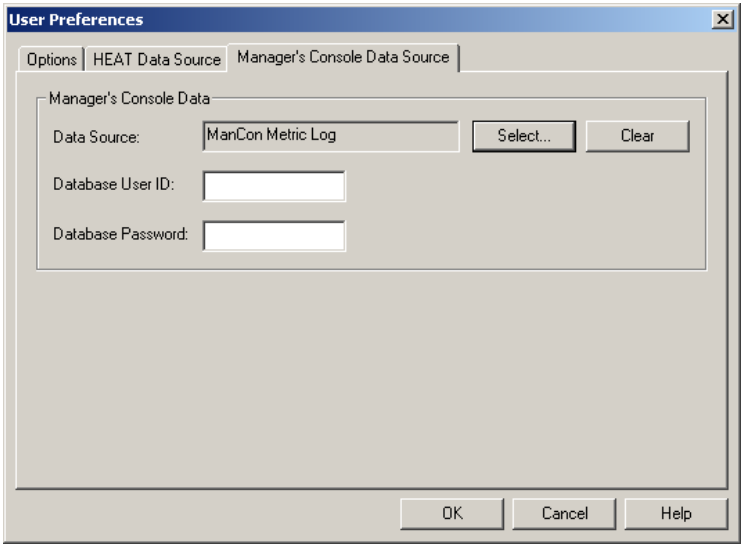


14. Click **Select**. The **Select Manager's Console Data Source** dialog box appears.

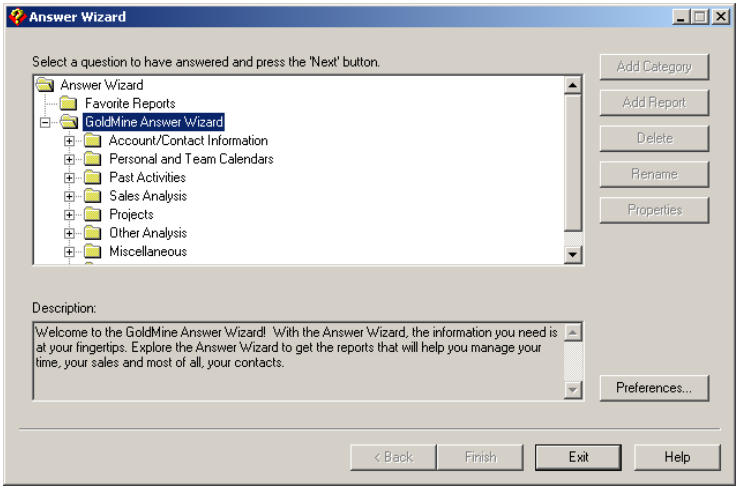

Select Manager's Console Data Source
Please specify the data source to use for Manager's Console
ManCon Metric Log
OK
Cancel

15. In the drop-down list, select **ManCon Metric Log**.

16. Click **OK**. The **Manager's Console Data Source** tab reappears.



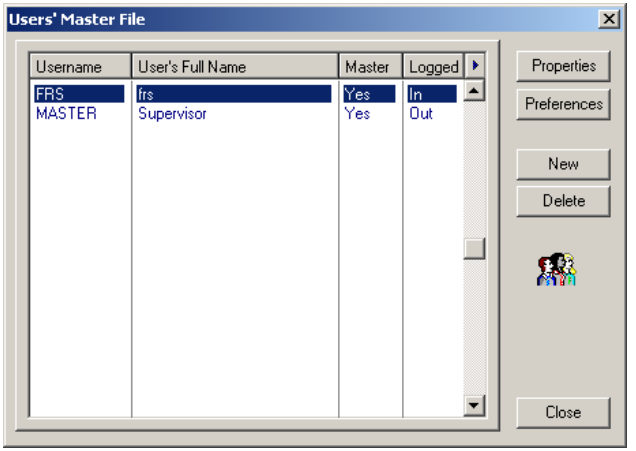
17. Click **OK**. The **Answer Wizard** main window reappears. Notice the GoldMine reports now appear in the tree.



18. Click **Exit**.

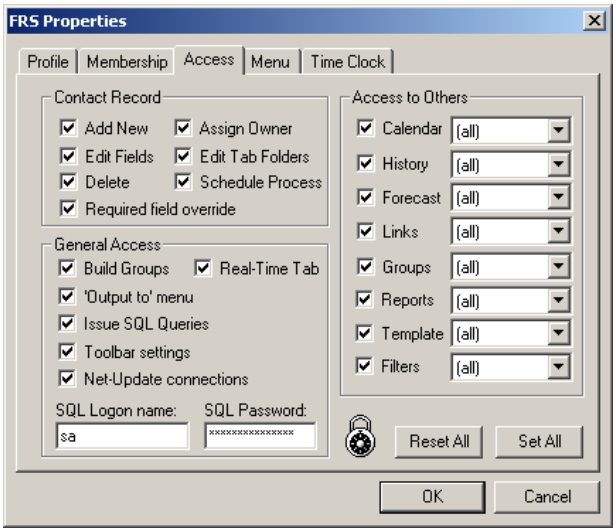
Verifying the SQL Login

1. From **Start**, select **Programs>>GoldMine>>GoldMine**. The GoldMine Login appears.
2. Log into GoldMine as the local administrator.
3. From the main menu, select **Tools>>User's Settings**. The **User's Master File** dialog box appears.



4. Select the local administrator user.
5. Click **Properties**. The **Properties** dialog box appears.

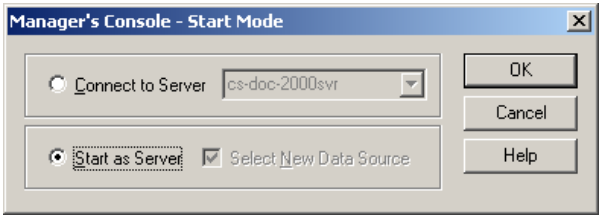
6. Click the **Access** tab.



7. Ensure the **SQL Logon name** and **SQL Password** are correct (such as, **sa** and **sa**).
8. Click **OK**. The **User's Master File** dialog box reappears.
9. Click **Close**.

Starting Manager's Console

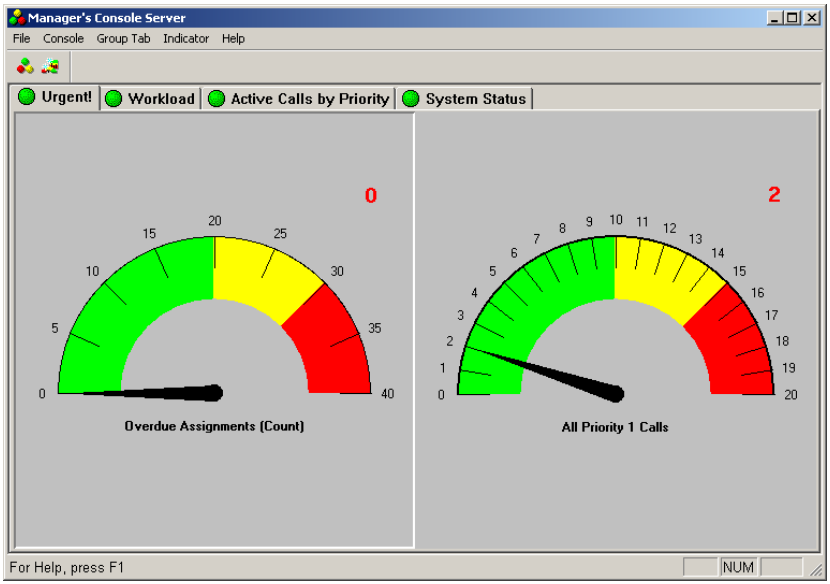
1. From **Start**, select **Programs>>GoldMine>>Manager's Console**. The **Manager's Console — Start Mode** dialog box appears.



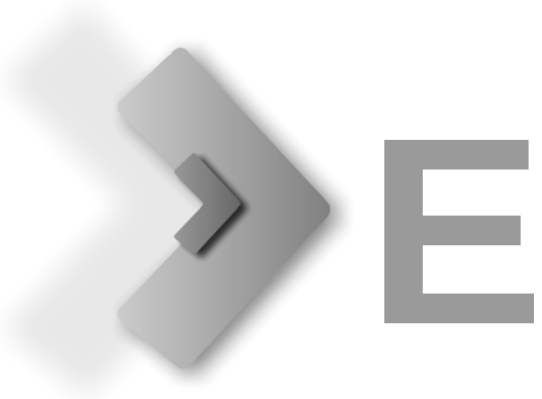
2. Select **Start as Server**.
3. Click **OK**. The **Select Manager's Console Data Source** dialog box appears.

4. In the drop-down list, select **GMSales_Mktg**.
5. The **GoldMine** login dialog box appears.

6. Type the GoldMine **Login ID** and **Password**.
7. Click **OK**. The **Manager's Console Server** opens.



📖 See the online Help in both applications for information on using these tools.



Migrating Large Databases

Overview

If you are upgrading from a previous version of GoldMine to 7.0 and have a large Microsoft SQL Server database (5GB of data or more), we recommend you consider the following steps before proceeding with the upgrade. Certain computers (limited computing power) require manual steps to upgrade the database successfully.

Note: These steps do not apply to Firebird databases.

IMPORTANT: If your upgrade has already failed, see "Failure During Upgrade" on page E-4.

Database Preparation

1. **BACKUP YOUR DATABASE**. This is especially important prior to migration. Also, a power failure or any unpredicted interruption may corrupt data. Invaluable data can be restored from the backup.
2. Truncate the transaction log.
   - From **Start**, select **Microsoft SQL Server>>Query Analyzer**.
   - Run:

     ```
     backup database_name with truncate_only
     ```
3. Purge the **syslog** table from GoldMine 6.7 (or your current version). Ensure you have backed up your database prior to purging.
   - To purge logs, select **View>> GoldMine Logs**. The **System Logs** dialog box appears. Select either **Process Monitor Logs**, **Maintenance Logs**, or **Error Logs**. Right-click for a menu. Select **Purge Logs**.
   - Select the check boxes for **Process Monitor**, **Maintenance**, and **Error** logs. Accept the default date (1 month) or adjust to extend. If you require more logs, revise according to the GoldMine online Help or the Administrator Guide.

Executing the Upgrade Process

With databases of nominal size, the install routine changes the tables listed below. Only use steps 8-14 as a guide to change the table structure as indicated below if the row size is exceptionally large (such as >500K rows):

a. CAL's Number2 field changed from INT to FLOAT.

b. OPMGR's F3 field changed to size 20.

c. SITEID from SYSLOG changed to 40.

d. SITEID from GSSITES changed to 40.

e. CONTHIST Units field from size 8 to 20.

Note: If any unpredictable event such as power failure, system crash occurs, you could potentially lose data or data corruption can occur. A backup allows you to ensure a smooth transition. You may want to restore the back up and restart the steps.

1. From **Start**, select **Microsoft SQL Server>>Enterprise Manager**. The **Enterprise Manager** appears.
2. In the **Console Root** tree, expand **Microsoft SQL Servers**.
3. Expand **SQL Server Group**.
4. Expand **local** (or server name).
5. Expand **Databases**.
6. Expand the **GoldMine** database.
7. Select **Tables**.
8. Select **CONTHIST**.
9. Right-click for a menu and select **Design Table**.
10. Under **Column Name**, navigate to the **Units** field.
11. In the **Length** column, change the number from 8 to 20.
12. Close the **Design Table** dialog box. The message **Do you want to save changes to table CONTHIST** appears.
13. Click **Yes** to save changes. The hourglass appears.
14. Wait for the changes to update the database structure. This may take some time.
15. When complete, close **Enterprise Manager**.
16. Start the GoldMine 7.0 Installer to upgrade the process.

Failure During Upgrade

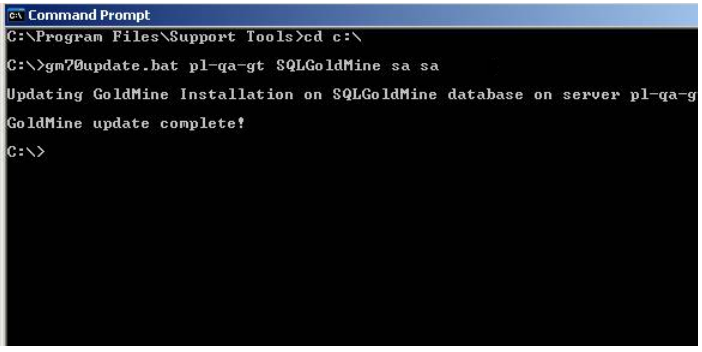
Take the following steps if, during migration, you received an error such as:

- Unit Conversion in CONTHIST
- Unit Conversion in CAL
- Unit Conversion in CONTSUPP

Note: This error may prevent you from logging in to GoldMine or immediately after logging into the application, the GoldMine application disappears.

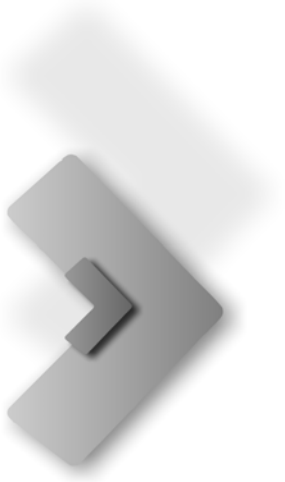
1. In your Web browser, open: **http://support.frontrange.com**
2. Select **Maintenance Customer Support>>Online Support**.
3. Log into the support site.
4. Select **Drivers and Downloads**.
5. From the drop-down list, select GoldMine Corporate Edition.
6. Locate and download "**Unit Conversion Error During GoldMine 7.0 Upgrade**."
7. Execute the patch in the DOS prompt by passing the right parameters:

   ```
   GM70Update SERVER_NAME DATABASE_NAME USERID PASSWORD
   ```


Command Prompt
C:\Program Files\Support Tools>cd c:\
C:\>gm70update.bat pl-qa-gt SQLGoldMine sa sa
Updating GoldMine Installation on SQLGoldMine database on server pl-qa-g
GoldMine update complete!
C:\>

8. Log into GoldMine 7.0 application

Note: Contact FrontRange Solutions' Customer Support for more information.



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